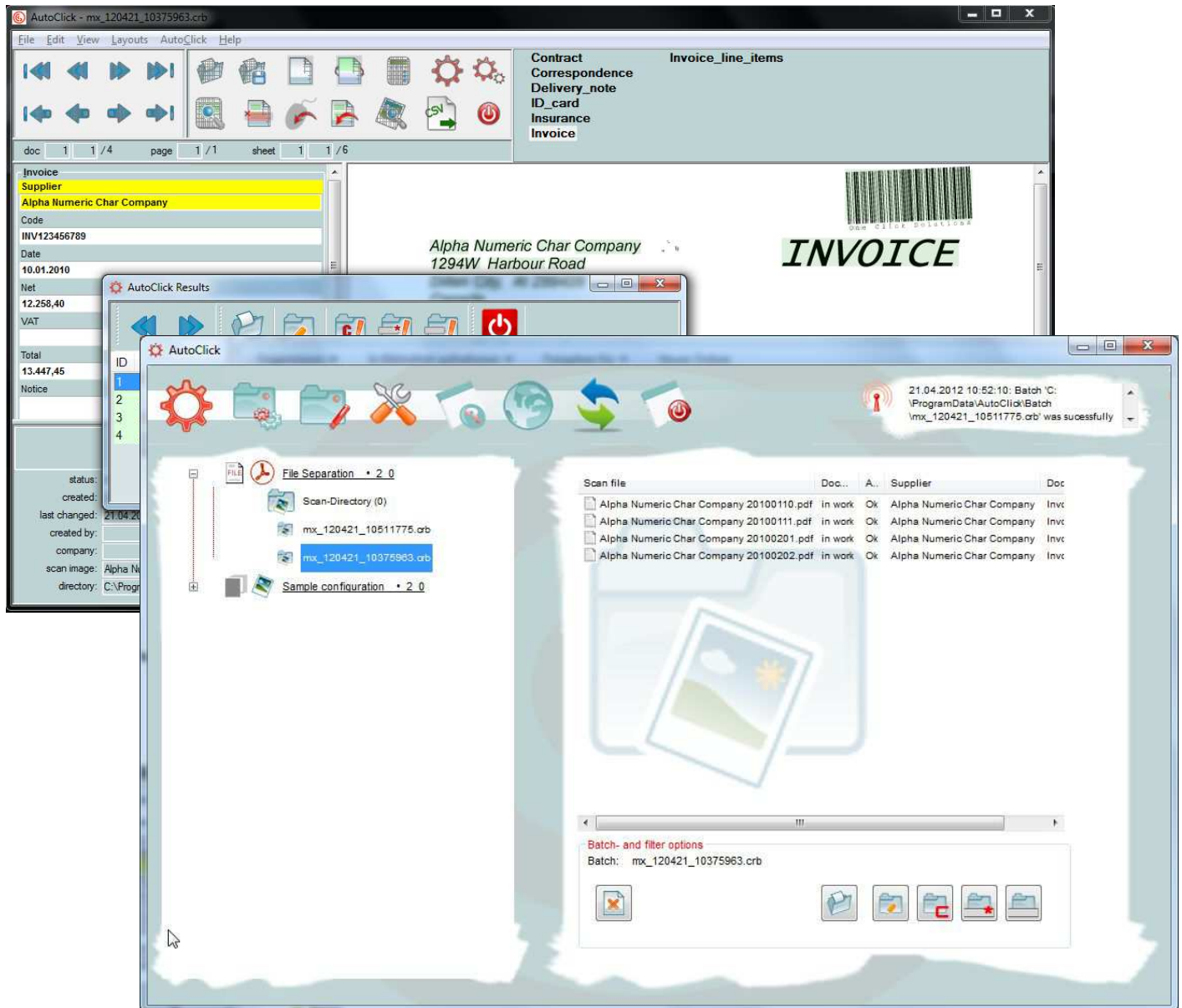


User Manual



AutoClick v4

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1. Introduction

The operating guidelines describe the basic steps working with the application AutoClick.

The basic steps are:

- a. Licensing
- b. define layouts
- c. run manual batch processing
- d. run automatic batch processing
- e. Capturing with AutoClick (Read and Train)
- f. Settings and configuration

To capture a batch of documents with AutoClick the application simply needs free access to the drive containing the documents. There is no difference whether the drive is local or somewhere in the local network. Therefore AutoClick needs no scan-interface or scan-client. Surely the image files can also be extracted from emails or can be copied from other drives. Again, AutoClick just needs free access to the documents which should be captured.

Just a short statement about the **quality of the images**: the better the quality of the images is the better the capturing result will be. In general image files with a solution of 300dpi will lead to sufficient relation between image quality and size of file. Sure, using a high quality scanner 200 dpi might also be sufficient.

Capacity/performance: the performance i.e. the time which is needed to capture a batch of documents primarily depends mainly on the computing performance that is available to the OCR. The factors that influence the performance of the OCR are mainly the amount of characters on a page, the size and font of the characters, the complexity of the document is (e.g. whether you have characters in different orientations) and the quality of the contrast between the characters and the background.

The input type of file for capturing may be TIF, PDF and JPG. The output file type may be the same or even PDF/A; it simply depends on the license key.

Note: documents from text- or calculation-programs and handwritten documents **cannot** be processed by AutoClick.

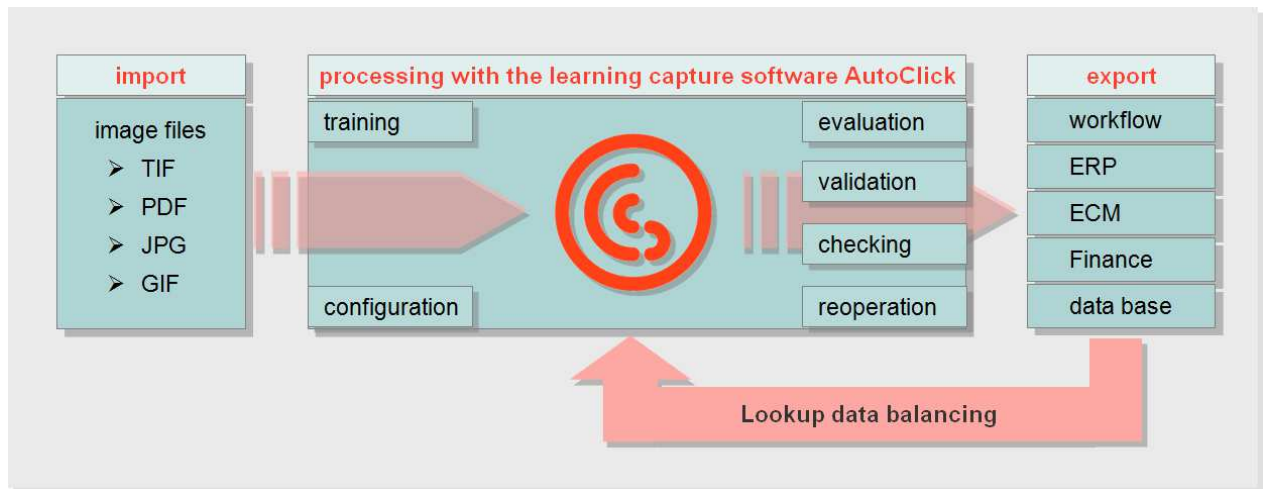
What kind of format can AutoClick deal with:

- each page of a document is one image file (e.g. single page TIF),
- all documents of a batch are stored in one file,
- each file includes one document (e.g. MultiPage-TIF)

In the first two cases a document separation has to be made before the batch process can be started. Otherwise AutoClick cannot decide of how many pages a document consists. The document separation can be done in different ways:

- put separation sheets (empty sheets) between the documents
- stick a barcode strip on the first page of each document
- print a keyword on the first page of each document (e.g. can be done by an imprinter)

AutoClick processes documents as follows:



Working with AutoClick the common steps are:

1. Definition of the needed layouts what should be captured in which way (automatic import for several integrations)
2. Setting up the file OneClickSettings.ini (definitions for batch processing, capturing and data export)
3. If needed: initialization of Lookup-data-sources
4. Test run: executing manual batch processing
5. Test run: executing data capturing and data export
6. Read and Train of suppliers, document types and layout fields
7. Productive operation: automatic batch processing, data capturing and data export

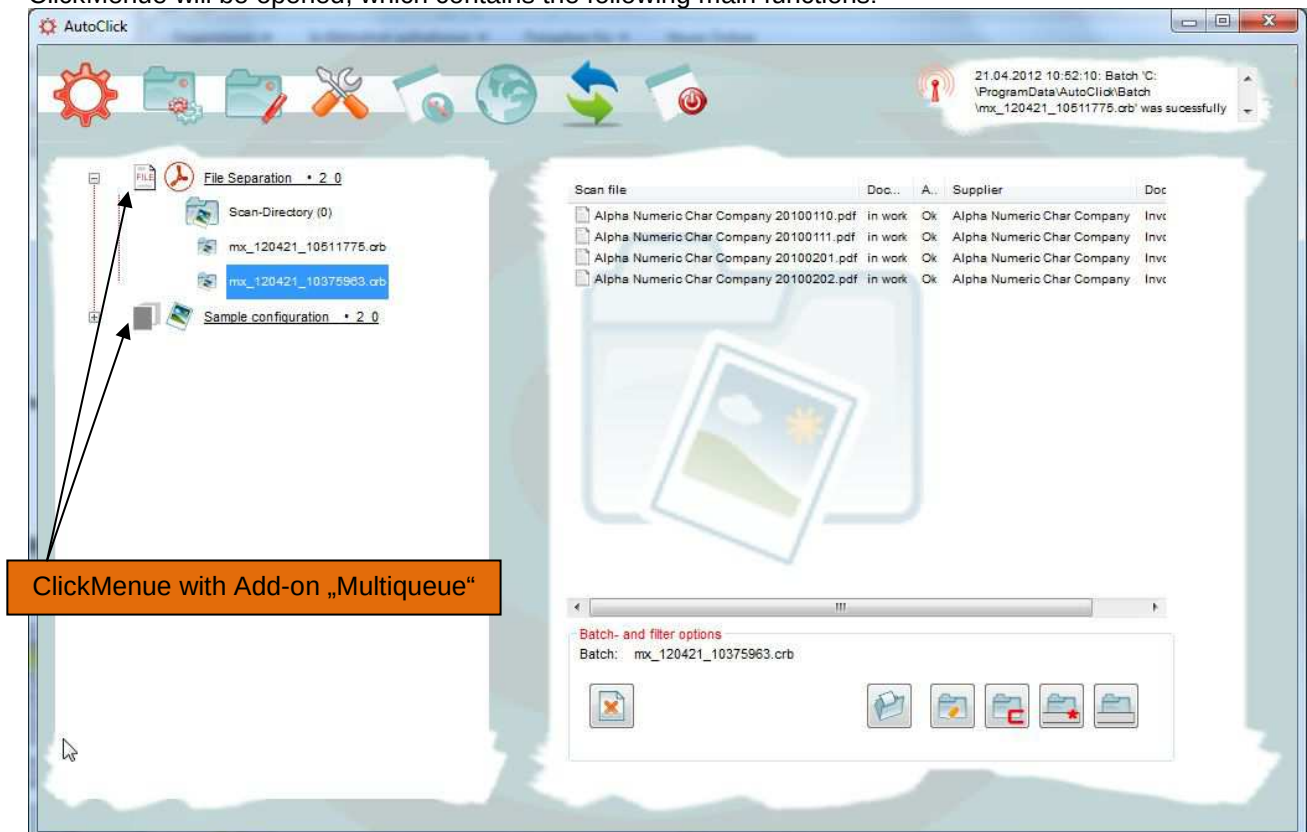
The application AutoClick runs on the Microsoft platforms Windows XP, Vista and 7 (64- and 32-Bit) as also with Microsoft Server 2003/2008 and can be integrated in Terminal Server Applications.

2. Functions AutoClick (ClickMenue)

AutoClick will be either started by the operating service (Add-on modul "Queue-Service" is needed) or can be manually started with the desktop-Icon:



ClickMenue will be opened, which contains the following main functions:



At the top of the menu you find the buttons for the available functions. The area on the left shows all the batches which have been already created (the latest batch is at the top). The first element in a queue shows the scan directory where the documents/images have to be copied to be processed for this queue..

If your license includes the Add-on module "Multiqueue" you also see the different queues which have been configured.

If you click on a batch all documents of the batch will be listed with their status in the area on the right. At the bottom all the available filter functions for the actual batch will be shown.

Notice: to process more than one queue you need to license and configure the Add-on "Multiqueue".

Notice: to run AutoClick as an operating system service you have to license and configure the Add-on "Queue-Service".

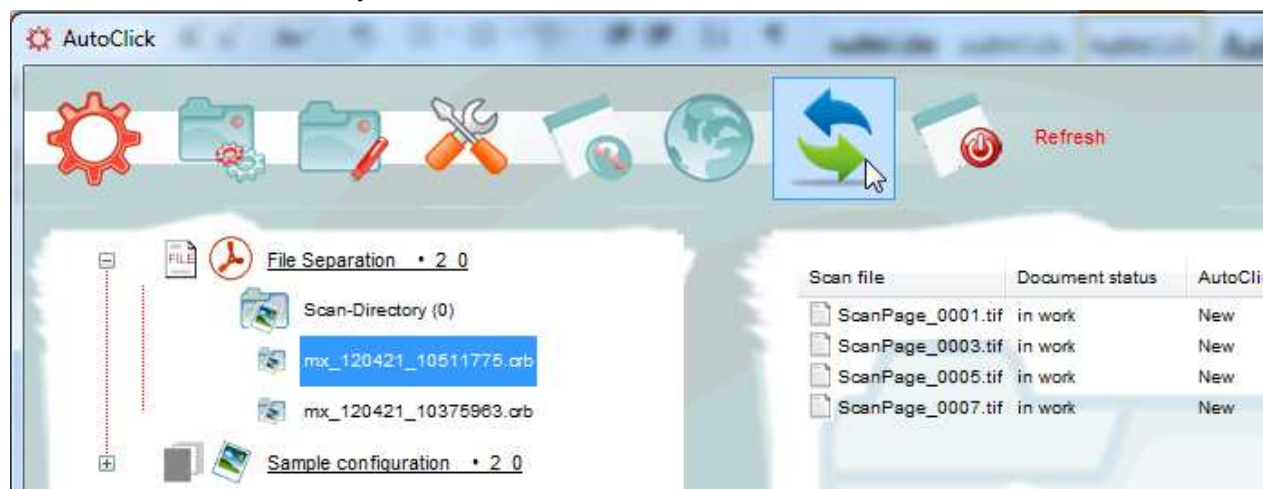
2.1. Buttons ClickMenue

-  **AutoClick:** here you capture and train documents
-  **Automatic batch creation:** creates automatically one or more batches depending on the configurations made
-  **Manual batch creation:** stepwise manual batch creation of one batch
-  **Configuration:** opens the configuration section in which most of the parameters for AutoClick are configured. In this section also the layouts for the capturing are configured.
-  **Help & Support:** opens the documentation directory in the installation directory. Here you find all kind of documentation to AutoClick.
-  **Website:** www.oneclicksolutions.de
-  **Exit.** Closes ClickMenu.
-  **Refresh.** Refreshes the menu after having made changes or inputs..

If you select a main function the ClickMenu window will be minimized until you exit the main function again.

If you touch a main function at the ClickMenu window at the right side the button function will be described in red letters.

If you click on a batch in a queue in the right window section all documents with their status will be listed and with all filter status you can select:



The name of a queue is to be configured in the configuration . You can choose the name you like.

2.1. Filter functions and batch delete

The following filter and batch options are offered:



The buttons have the function:



Delete batch: with this button a batch can be deleted. There is a safety request before realization.



Show all documents: all documents of the selected batch will be listed..



Documents in work: by this selection you get all documents listed which are in process i.e. the capturing has not yet been completed..



Documents with a classification error: all documents are listed where AutoClick did not find a supplier or a document type. So may be the supplier or document type is yet unknown or the training has to be improved in this cases.



Documents with error in mandatory fields: list of documents with detection errors in mandatory fields (index fields). So you have to change or improve the training. Whether a field is mandatory or not has to be decided in the layout editor (where you create and define the layouts) in the configuration.



Documents with detection errors: here you get a list of all documents with capturing errors in general fields. You have to train these fields, improve the training or change the training to avoid these errors.

2.1. Batch repair

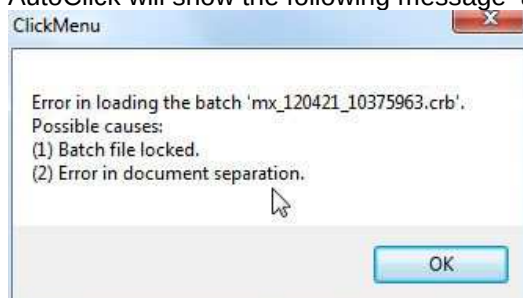
When you create a new layout or change a layout and then try to reopen a batch you get the following message:



The reason for this message is that the layout database does not any longer match to the already captured information.

So now you have two possibilities: either to delete the batch or repair it. Pressing the button "Repair batch" AutoClick processes all documents of the selected batch again (including OCR).

If you don't press one of the two mentioned buttons and try to proceed you won't be successful. AutoClick will show the following message and then return to ClickMenu:



3. Manual Batch Processing (ClickScanner)

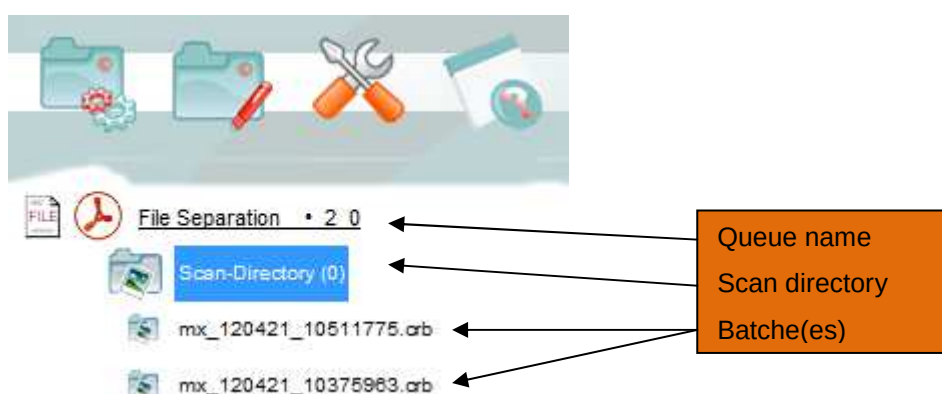
In manual processing, pages can be separated manually or documents comprised of several pages can be put together to make up a logical document, pages can be rotated manually and the individual pre-processing functions can be initiated manually.

In productive operating environments, manual batch processing will largely be the exception. The main purpose of manual batch processing is to test settings/parameters. In a majority of cases, automatic batch processing is used in productive operating environments.

Manual batch processing is to be started via the ClickMenu:



Before you start the manual batch processing (ClickScanner) you have to select either a batch or the scan directory or the queue name:



If you select a scan directory which is empty or the queue name the ClickScanner window will be empty and only four buttons are sensitive:



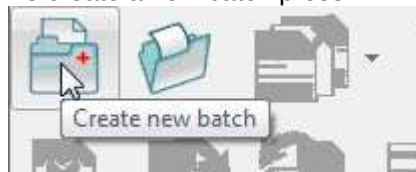
The sensitive buttons are:

- Create new batch
- Open existing batch
- Help: what to do next?
- Exit.

So the next step will be to open an existing batch or create a new one.

3.1. Create and prepare a new batch

To create a new batch press:



The typical Microsoft Windows procedure to store a file or folder has to be passed. As batch name the configured default name plus date and time will be suggested and can be optionally changed .

For each generated batch AutoClick creates a *.crb-file and a folder with the same name where all the captured documents and export files (with the captured Information) will be stored.

In the next step, a batch name and directory must be assigned, in which the batch is to be stored. The files that are to be processed must be stored in a batch.

Attention: only TIF, PDF, JPEG etc... image files can be processed. Files from Microsoft processing systems (Word, Excel, PPT) or spread sheets are not image files and as such cannot be processed.

Having finished this step you will be asked in the following step from which directory and which files you want to be processed (select between TIF, PDF and "all"). You can also process JPG and other image files.

Having successfully loaded the image files all buttons in the ClickScanner window will now be sensitive:



Now pre-processing can commence. Users can select individual files in the left screen panel at any time. The files are then immediately displayed on the main screen.

The left screen panel contains the table form information on the files. In addition column #, document, page, asterisk *, and file name are displayed:

#	The pages that are to be processed in the current batch are numbered sequentially.
Document	The number of the document that is to be processed in the current batch
Page	Page number of the respective document
*	Processing status
File name	File name remains the same as when it was imported

The entire table is highlighted in red. This means that the pre-processing has not yet been completed; the batch cannot yet be captured by AutoClick.

Notice: to assist you during the manual batch processing you can press the button  at any time. The button realizes a context help menu and tells you how to proceed.

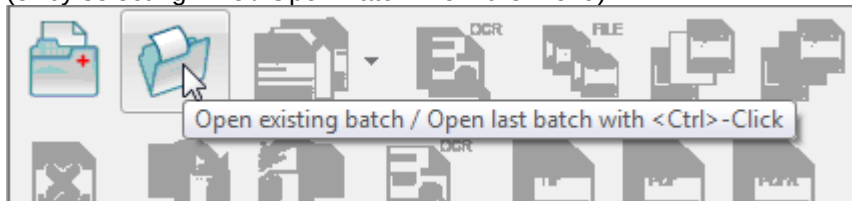
The manual batch processing includes the sequent steps:

- Create a new batch
- Load the files you want to have to be captured
- Eliminate the empty pages
- Process the OCR
- Execute the document separation

Only when these steps have been done successfully you can proceed with the capturing and training.

3.2. Selection of an existing batch

If a user would like to process an existing batch, the existing batch is selected by clicking on the button (or by selecting "File / Open Batch" from the menu):



The displayed Microsoft menu (default navigation path: C:\ProgramData\AutoClick\Batch) displays the existing batch directory, as well as a crb-file associated with each directory. The desired crb-file is selected and is opened by selecting "Open".

The associated batch image files are now displayed in the left screen panel. The batch status has not changed since it was the last processed. The user can now continue processing and/or revise the batch.

3.3. Buttons (ClickScanner)

The next pre-processing steps depend on the specific capturing process (the step prior to the actual capturing of the documents begins with AutoClick).

Important: OCR (Optical Character Recognition) and the separation of documents into logical units are mandatory. If the two steps are not completed the capture process cannot be initiated. The user can also ascertain if the capture process can be initiated by the color of the highlight (red or green) of the left screen panel in the ClickScanner screen. AutoClick will only be initiated if the status is green.

The important functions of ClickScanner are accessible a buttons:



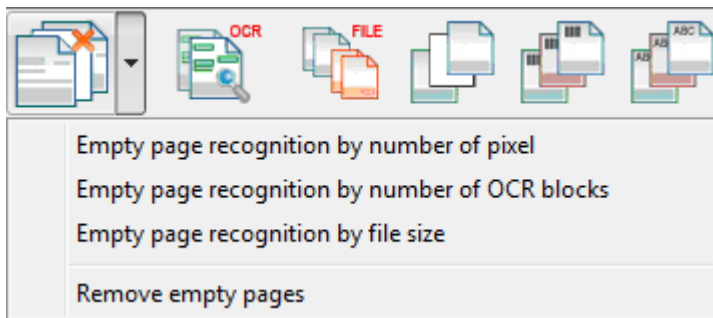
The following buttons can be selected:



Create new batch: this function opens the "save batch as" window. This function creates the new batch. Default name suggestions are offered for the batch name and batch directory. The default names can be changed or renamed. The batch directory is created with the "save" function and the following screen "open images" refers to the directory from which the image files are loaded.



Open existing batch: this function displays the window in which the existing batch is opened (corresponding default navigation path). The "Open" function opens the batch and the associated image files and status. The batch/stack status has not changed since it was last processed.



Detect empty pages. This function eliminates empty pages according to the selected criteria. This function is to be initiated after OCR has been executed (because OCR blocks cannot be recognized until the OCR process has been performed). The criteria definition (for example: the minimum number of pixels that define that a page is not empty) is set in the configuration.

There are different methods to recognize empty pages:

- **number of pixel:** set a limit of pixels underneath a page is characterized as empty.
- **number of OCR blocks:** set a limit of OCR blocks underneath a page is characterized as empty.
- **file size:** set a limit of file size underneath a page is characterized as empty.
- **remove empty pages:** eliminates the current recognized empty pages.



OCR recognize all pages. This function performs the actual OCR process, i.e. Optical Character Recognition. After the OCR process has been completed an asterisk “*” is automatically entered into each row of the asterisk “*” column. This indicator shows the pages that have been analyzed with OCR. All the pages of a batch do not have to be analyzed with OCR. However, text cannot be extracted from pages that have not been analyzed with OCR.

The OCR recognizes only type written letters, numbers and special characters. Hand written characters and logos will not be properly recognized

Recognized characters look like this:

INVOICE

If you navigate the mouse pointer on a recognized field it will turn red and the recognized expression is shown:

INVOICE
INVOICE

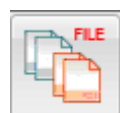
If you want to check a more than one block just capture it with the mouse pointer and the recognized blocks will be listed at the bottom of the window:

	Pos	Description	Cost
	0001	1x AutoClick (software licence) PDF-input/-output, seat licence, 120.000 p/a	8,540.00
1x AutoClick (software licence) PDF-input/-output, seat licence.			

There are two buttons for the OCR: recognize all pages and recognize a single page. In addition you can select via the menu "Edit / OCR recognition" the function "unrecognized pages".

When the OCR is done for all pages the status windows for all pages look like this (asterisk column is completely filled):

#	D...	*	Source
1		*	Alpha Numeric Char Comp:
2		*	Alpha Numeric Char Comp:
3		*	Alpha Numeric Char Comp:
4		*	Alpha Numeric Char Comp:



Document separation by MultiPage-TIF files. Based on the criteria settings, this function takes the individual pages of a logical document and summarizes them into one logical document. This function can only be executed after the OCR process has been performed. The table background highlight color switches from red to green after this function has been performed. At this point documents can be captured with AutoClick.



Document separation by separator page (auto detected). This function separates documents based on the empty separator sheets. This function can only be executed after the OCR process has been performed. The table background highlight color switches from red to green after this function has been performed. At this point the capture process can be performed with AutoClick or empty pages can be eliminated (see above).



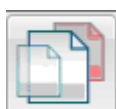
Document separation by barcode. This function separates documents based on defined bar codes. The barcode is defined in the software settings. This function can only be executed after the OCR process has been performed. The table background highlight color switches from red to green after this function has been performed. At this point the capture process can be performed with AutoClick or empty pages can be eliminated (see above).



Document separation by keyword. This function separates documents based on a defined keyword. The keyword is defined under "settings" in the menu. This function can only be executed after the OCR process has been performed. The table background highlight color switches from red to green after this function has been performed. At this point the capture process can be performed with AutoClick or empty pages can be eliminated (see above).



Manual document separation: new document. This function is utilized for the manual separation of documents. This function is only possible, if the document separation has not been performed or was deleted again. The background highlight color of this table must be red.



Manual document separation: follow-up page. This function assigns the current page to the current document, as a subsequent page. Documents can be comprised of any documents. This function is only possible, if the document separation has not been performed or was deleted again. The background highlight color of this table must be red.



Delete page. This function deletes the selected page from a batch. The corresponding page is also eliminated from the table. The remaining table entries remain unaffected.



Rotate right. In the event this function is performed after the OCR analysis has been completed, OCR must be repeated because this function overrides the recognized text. The green frame around the text blocks disappears and the corresponding asterisk "*" disappears from the table.



Rotate left. In the event this function is performed after the OCR Analysis has been performed, OCR must be repeated because this function overrides the recognized text. The green frame around the text blocks disappears and the corresponding asterisk "*" disappears from the table.



OCR recognize single pages. OCR analysis can also be performed on individual pages. After this step has been completed a green frame highlights the recognized text blocks on the respective pages. The left screen panel background is still highlighted in red. After the OCR process has been completed an asterisk "*" is automatically entered into each row of the asterisk "*" column. This indicator shows the pages that have been analyzed with OCR. All the pages of a batch do not have to be analyzed with OCR. However, text cannot be extracted from pages that have not been analyzed with OCR.



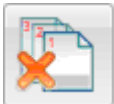
Create documents in Multipage Tif format



Create PDF format (image PDF).



Create PDF/A format



Delete document separation (assignment of pages to documents). This function deletes page separations that have already been performed. The background of the table in left panel switches back to red from green.



Context help: Wie geht's weiter. Kontextbezogene Hilfe, die sie dabei unterstützt, was als nächstes zu tun ist, bzw. was Sie überhaupt tun können.



Start capturing with current batch. After preprocessing (OCR, document separation, page assignment) is completed, this button is utilized to initiate the capturing function(e.g. AutoClick, ClickReader, ClickWizard). This function is only possible, if the document separation has not been performed or was deleted again. The background highlight color of this table must be green.



Exit.

	To the first page		To the next page
	To the first document		To the next document
	To the previous document		To the last document
	To the previous page		To the last page

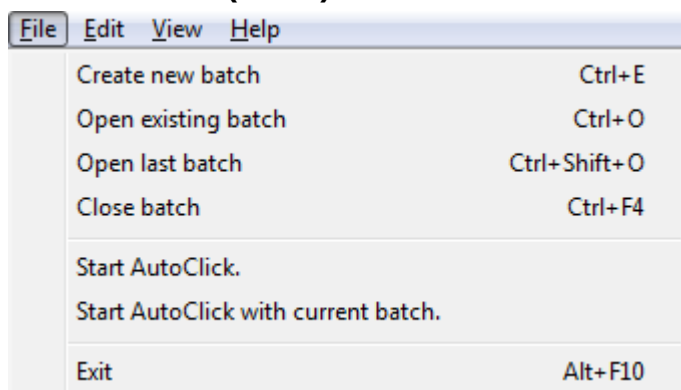
Pages or documents can be accessed directly by clicking the respective page in the red/green table in the ClickScanner screen or by selecting the buttons described above.

3.4. Menu and Function Overview (ClickScanner)

The main menus in ClickScanner are:



3.4.1. File (Menu)



Create a new batch



Read the explanations to the button.

Attention: before a document batch can be captured with AutoClick, document separation and OCR page recognition must be performed. However, AutoClick can be opened with a batch that has not been processed with optical character recognition, but nothing can be captured (because the optical character recognition process has not been performed).

Open existing batch:



Read the explanations to this button.

Open last batch:

This function opens the batch which has been processed last time.

Close batch

The function closes an opened batch and returns to the empty ClickScanner screen:

Start AutoClick

The function starts the AutoClick application. A batch can be opened for capture in the AutoClick screen that is subsequently displayed.

AutoClick with current batch

The function starts the AutoClick application with the document batch that is currently being processed.

Exit

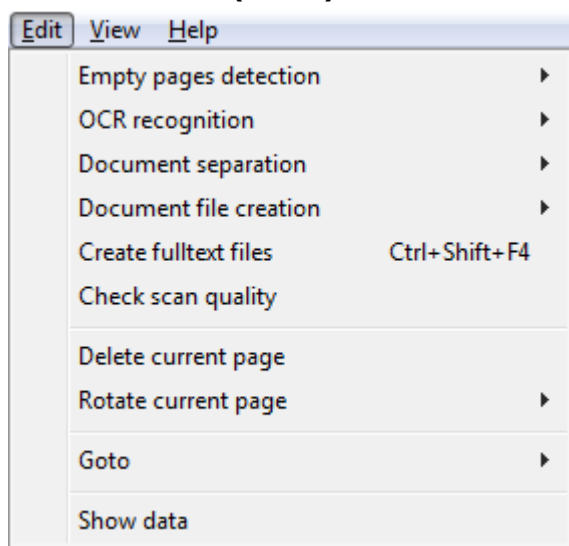
The function closes the ClickScanner application. If the page recognition and page assignment functions were not performed on the current batch the user is warned by the following message:



By clicking “Yes” the application is shut down properly. The batch pages were not recognized and assigned.

By clicking “No” the application is not shut down. The user can continue to process the batch.

3.4.2. Edit (Menu)



Empty pages detection

The “**Edit / Empty Pages detection**” function offers the following options to recognize empty pages in a batch or to clear empty page recognition:

- **Number of pixels:** the number of pixels can be set here. Pages are classified as empty if the pixel number is lower than the setting.
- **File size:** the files size setting can be set. Pages are classified as empty if the file size is smaller than the setting.
- **Number of OCR blocks:** the number of OCR blocks can be set. The number signifies the number of recognized OCR blocks that would still be classified as an empty page.
- **Remove Empty Pages**” removes all empty pages.
- **Clear Empty Pages Recognition**” reverses the empty page recognition process.

Attention: in the event empty page separation is not performed, the “document separation” function is not able to recognize and delete empty pages!

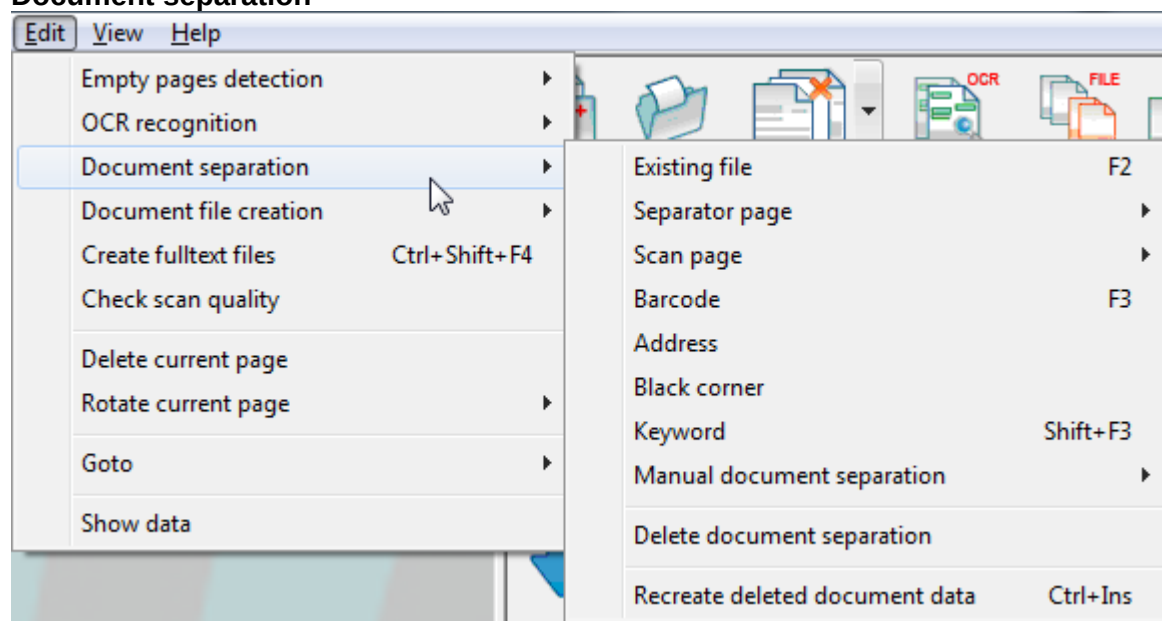
Attention: the “Document Separation / Separator Page ...” function requires the recognized empty pages to separate the documents. If the empty pages are deleted with the “Delete Empty Pages” function the document separation process cannot be performed on the basis of empty pages.

OCR page recognition



Read the explanations to this button.

Document separation



- **Existing file:** All pages of a MultiPage TIF file are summarized into one logical document.
- **Separator Page:**

Auto detected scan mode	Shift+F2
Single sided scan mode	
Double sided (duplex) scan mode	

- o Auto detected scan Mode: The document separation is performed on the basis of separator sheets; in addition all empty pages are eliminated.
- o Single sided scan mode: Document separation is performed on the basis of separator sheets and the acceptance of single side scanned documents; in addition all empty pages are eliminated.
- o Double sided (duplex) scan mode: Document separation is performed on the basis of separator sheets and the acceptance of duplex scanned documents; in addition all empty pages are eliminated.

Attention: the function “Separator page” needs all empty pages to work proper. If you process the function “Remove Empty Pages” before a document separation via separator page cannot work!

- **Scan page:** you can select whether the separation will be made after each page (single sided scan) or after the always second recognized page (double sided scan).

- **Barcode:** this function recognizes the first page of a document by means of defined barcodes. The definition is performed in the OneClickSettings.ini function.
- **Address:** the separation will be done by recognition of an address window.
- **Black corner:** this function looks after a black corner on a page and separates then the document.
- **Keyword:** this function recognizes the first page of a document by means of defined keywords (stamps etc...). The definition is set in the OneClickSetting.ini function. The keyword definition must be unique and may not appear in the text of the document!

Attention: Optical Character Recognition (OCR) must be performed prior to the execution of the "Edit / Document Separation / Keyword" function, because otherwise the keyword is not available.

- **Manual document separation:** this function performs the document separation on the currently listed pages (**begin the new document**) or adds the current page to the current document (**subsequent page assignment**).
- **Delete document separation** deletes the document separation of the batch that has been performed in full.
- **Recreate deleted document data:** this function executes in first step the function "Delete document separation" and in second step the function "Create documents in MultiPage-TIF format".

When the document separation has been successfully done all pages and documents are listed in an ascending sequence of numbers:

#	Document	Page	*	Source
1	1	1	*	Alpha Numeric
2	2	1	*	Alpha Numeric
3	3	1	*	Alpha Numeric
4	3	2	*	Alpha Numeric

Document file creation

The function creates different output files. You can select between:

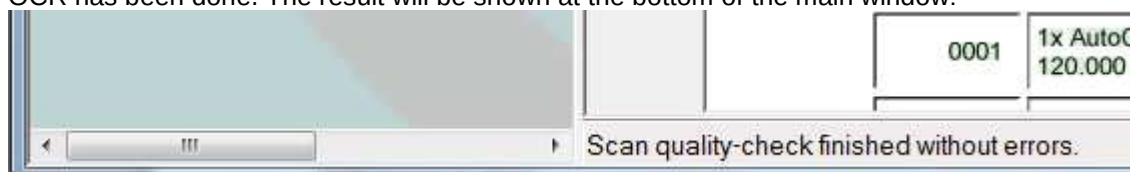
- MultiPage-TIF format
- PDF Image only format
- Searchable PDF format
- Searchable PDF/A format

Create fulltext files

The function extracts all recognized information from an analyzed document into a text file. This file will be stored in the same export directory as configured. You can start the function after the OCR and the document separation have been done.

Check scan quality

The “**Edit / Check scan quality**” function checks the quality of all pages of the current batch. In the status line at the bottom of the window the result is shown. You can execute the function after the OCR has been done. The result will be shown at the bottom of the main window:



Delete current page

The function deletes the current page from the batch. The function should, for example, be performed on pages that are not needed in a document.

Rotate page

The menu consists of the following functions:

- Clockwise
- Counterclockwise
- 180 degrees

Go to

This function can jump to any page or document in the current batch and displays the associated page. The following Go to functions exist:

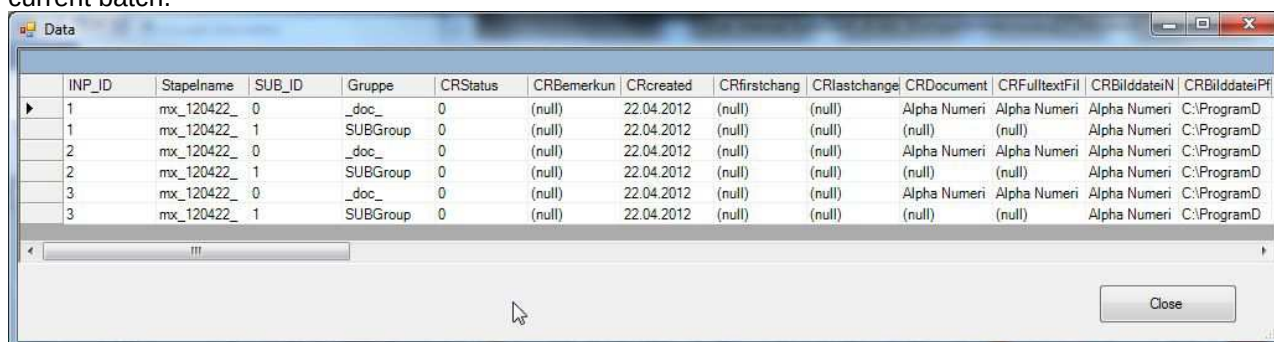
- **First document**
- **Previous document**
- **Next document**
- **Last document**
- **First page**
- **Next page**
- **Previous page**
- **Last page**



Attention: The page assignment must be performed prior to performing the “Edit / Go to” function, because otherwise the document or page assignment function is not possible.

Show data

The function displays the results table derived from the data records, which were created for the current batch.

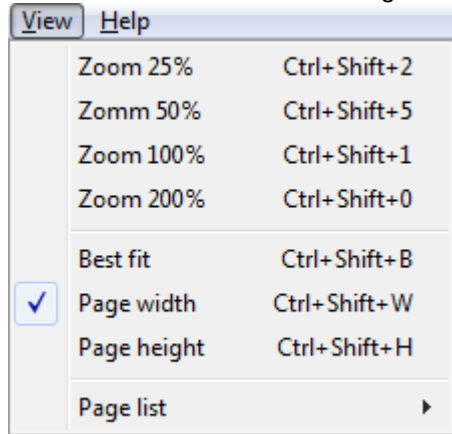


INP_ID	Stapelname	SUB_ID	Gruppe	CRStatus	CRBemerkun	CRcreated	CRfirstchang	CRlastchange	CRDocument	CRFulltextFil	CRBilddateiN	CRBilddateiPf
1	mx_120422_	0	_doc_	0	(null)	22.04.2012	(null)	(null)	Alpha Numeri	Alpha Numeri	Alpha Numeri	C:\ProgramD
1	mx_120422_	1	SUBGroup	0	(null)	22.04.2012	(null)	(null)	(null)	(null)	Alpha Numeri	C:\ProgramD
2	mx_120422_	0	_doc_	0	(null)	22.04.2012	(null)	(null)	Alpha Numeri	Alpha Numeri	Alpha Numeri	C:\ProgramD
2	mx_120422_	1	SUBGroup	0	(null)	22.04.2012	(null)	(null)	(null)	(null)	Alpha Numeri	C:\ProgramD
3	mx_120422_	0	_doc_	0	(null)	22.04.2012	(null)	(null)	Alpha Numeri	Alpha Numeri	Alpha Numeri	C:\ProgramD
3	mx_120422_	1	SUBGroup	0	(null)	22.04.2012	(null)	(null)	(null)	(null)	Alpha Numeri	C:\ProgramD

Attention: The page assignment must be performed so that the data records can be created for the current batch/stack. In the event the page assignment was not performed for the current batch the displayed results table will not contain any data records.

3.4.3. View (Menu)

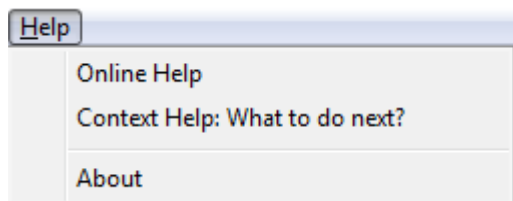
The "View" menu function changes the depiction of the document view in the ClickScanner screen.



The following functions are available:

- ☐ **Zoom 25%** displays the current page of the batch at 25% of the original size.
- ☐ **Zoom 50%** displays the current page of the batch at 50% of the original size.
- ☐ **Zoom 100%** displays the current page of the batch at 100% of the original size.
- ☐ **Zoom 200%** displays the current page of the batch at 200% of the original size.
- ☐ **Best fit** displays the current page in full.
- ☐ **Page width** adjusts the page width to fit the window width.
- ☐ **Page height** adjusts the page height to fit the window height.

3.4.4. Help (Menu)



Help

The "Help / Help" function starts the application's help system.

Online help

The function starts the internet online help (http://www.oneclicksolutions.de/help/online/cs_de/) where you will always find the latest version of the help.

Context help, what to do next

The function is a context help which suggests at any state of process what to do next or why anything could not be executed.

About

The function displays the version numbers for the ClickScanner application and the FineReader Engine.

3.5. Function Keys (Click Scanner)

The following function keys are available in ClickScanner. The function keys are also listed in the individual menus. The yellow background indicates that these functions can also be started by buttons.

File:

Create new batch	Strg + E
Open existing batch	Strg + O
Open last batch	Strg + Shift + O
Close batch	Strg + F4
Start AutoClick	
Start AutoClick with current batch	
Exit	Alt + F10

Edit:

Empty pages detection:	
Number of pixel	
File size	
Number of OCR blocks	
Remove empty pages	
Clear empty page recognition	
OCR recognition:	
All pages	Strg + Shift + E
Single page	
All unrecognized pages	
Document separation:	
Existing file	F2
Separator page:	
Auto detected scan mode	Shift + F2
Single sided scan mode	
Double sided scan mode	
Scan page:	
Single sided scan	
Double sided scan	
Barcode	F3
Address	
Black corner	
Keyword	
Manual document separation:	
New document	F4
Follow-up document	F5
Delete document separation	
Recreate deleted document data	Strg + Ins
Document file creation:	
Create documents in MultiPage-TIF format	
Create documents in Pdf Image only format	
Create documents in searchable Pdf format	
Create documents in searchable PDF/A format	
Create fulltext files	Strg + Shift + F4

Check scan quality

Delete current page

Rotate current page:

Clockwies

Strg + R

Counter clockwise

Strg + L

180 degrees

Strg + U

Goto:

First document

Strg + F6

Previous document

Strg + F7

Next document

Strg + F8

Last document

Strg + F9

First page

Shift + F6

Previous document

Shift + F7

Next page

Shift + F8

Last page

Shift + F9

Show data

View:

Zoom 25%

Strg + Shift + 2

Zoom 50%

Strg + Shift + 2

Zoom 100%

Strg + Shift + 2

Zoom 200%

Strg + Shift + 2

Best fit

Strg + Shift + S

Page width

Strg + Shift + B

Page height

Strg + Shift + H

Page list:

Thumbnails

Strg + Shift + T

List

Strg + Shift + D

Help:

Online help

Context Help: What to do?

About

4. Automatic Batch Processing (CReEngine)

4.1. Processing documents from one directory

The automatic batch processing is manually started by clicking on the second button in ClickMenu or automatically started via the Add-on "Queue-Service".

Before you can start the automatic batch creation you have to load image files in the scan directory. There are two possibilities to do so:

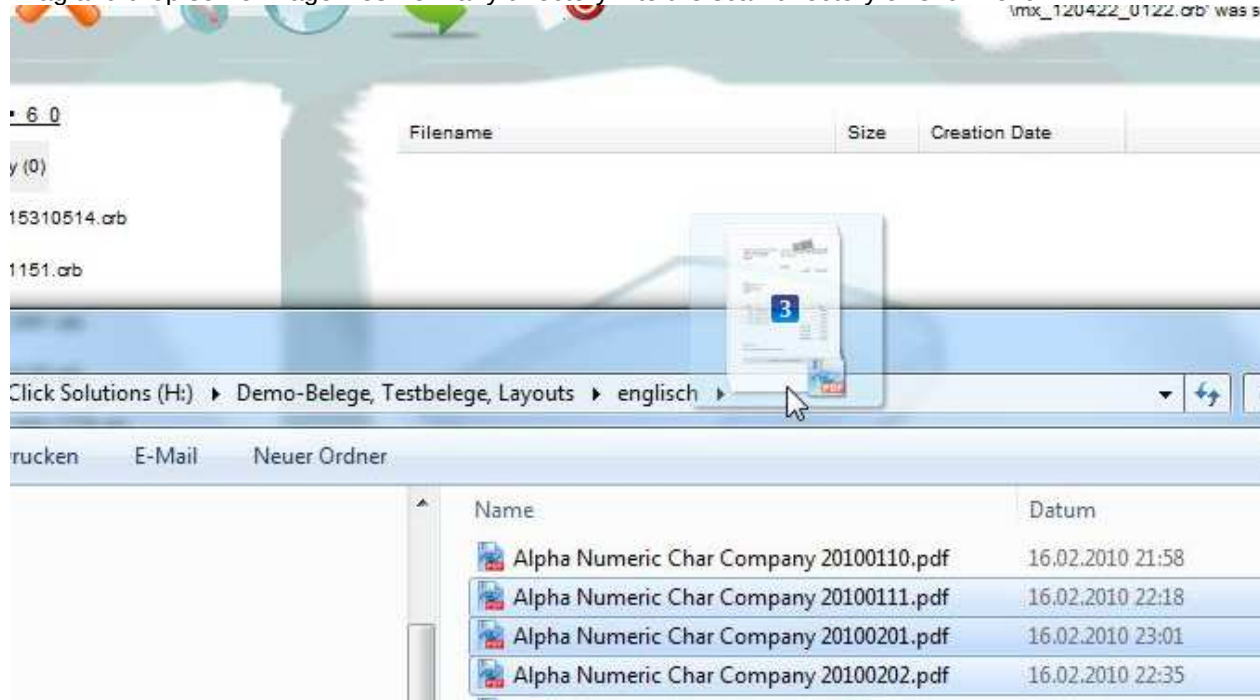
- You scan or copy the files directly into the scan directory which is by default C:\ProgramData\AutoClick\Scans
- You just manually drag and drop the files into scan directory in ClickMenu.

How to drag and drop image files into the scan directory in Click menu:

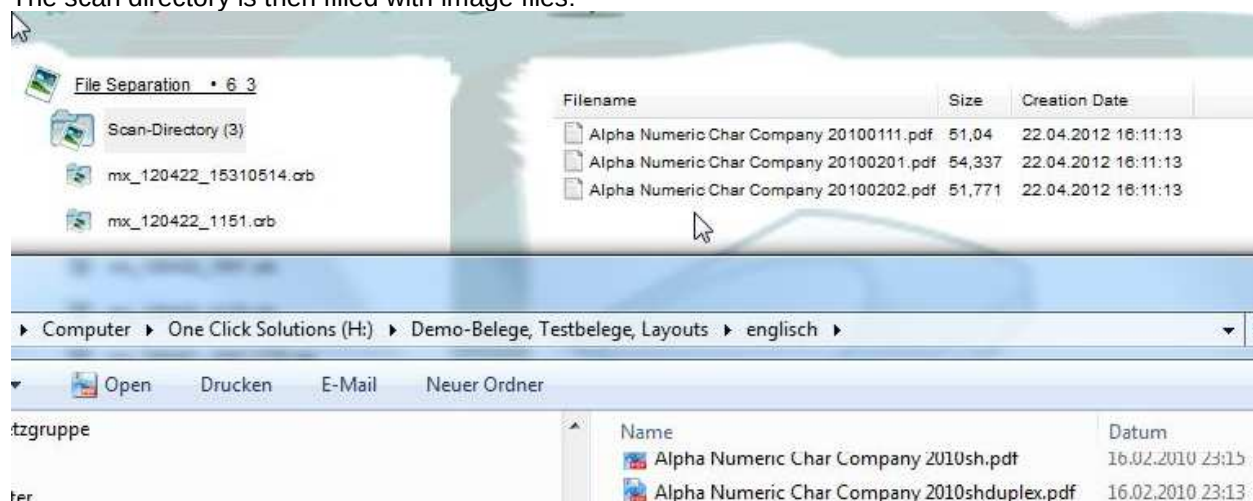
Click on the scan directory in ClickMenu. There are no files listed in the window on the right (i.e. the scan directory is empty):



Drag and drop some image files from any directory into the scan directory of ClickMenu:



The scan directory is then filled with image files:



Now you can start the automatic batch creation:



Depending on the configuration the automatic batch creation either shows up with the main window of AutoClick or can even start the first read in AutoClick.

4.2. Processing documents from multiple directory

To process more than one scan directory you need the AutoClick Add-on "Multiqueue". Having licensed this Add-on you can process as many directories as you like.

How to create a multiqueue processing?

You have to open administration directory of AutoClick, where you find all processed documents, captured information, layouts and the configuration file which is named "oneclicksettings.in". By default you will find it here: C:\ProgramData\AutoClick.

Now you just copy the configuration "oneclicksettings.ini" and rename it as you like, e.g. "oneclicksettings-barcode.ini".

Notice: Be sure that you have always one file called "oneclicksettings.ini" otherwise AutoClick will automatically create a new default oneclicksettings.ini with default settings!

You can vary the settings in the configuration files as you like:

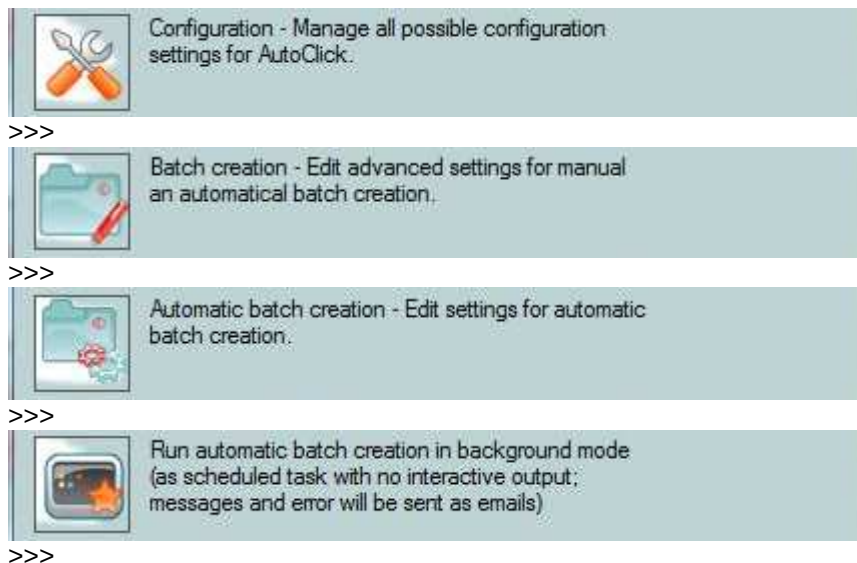


4.3. Automatic batch processing with Email messaging

Particularly when you have big batches with many pages the automatic batch creation can take some time. Main reason for this is the OCR.

In these cases the automatic process can be optimized if the automatic batch creation sends an email to the operator to tell him that he now can start with the training or capturing.

To do so you have to make the following settings in the configuration:



In this submenu you have to tick the checkbox and then step through the menu til you you come to the settings with the email addresses:



5. Read and training of documents with AutoClick

You can start the reading and training of documents by the following ways:

Manual start via ClickMenu:



Automatic start via the automatic batch creation:

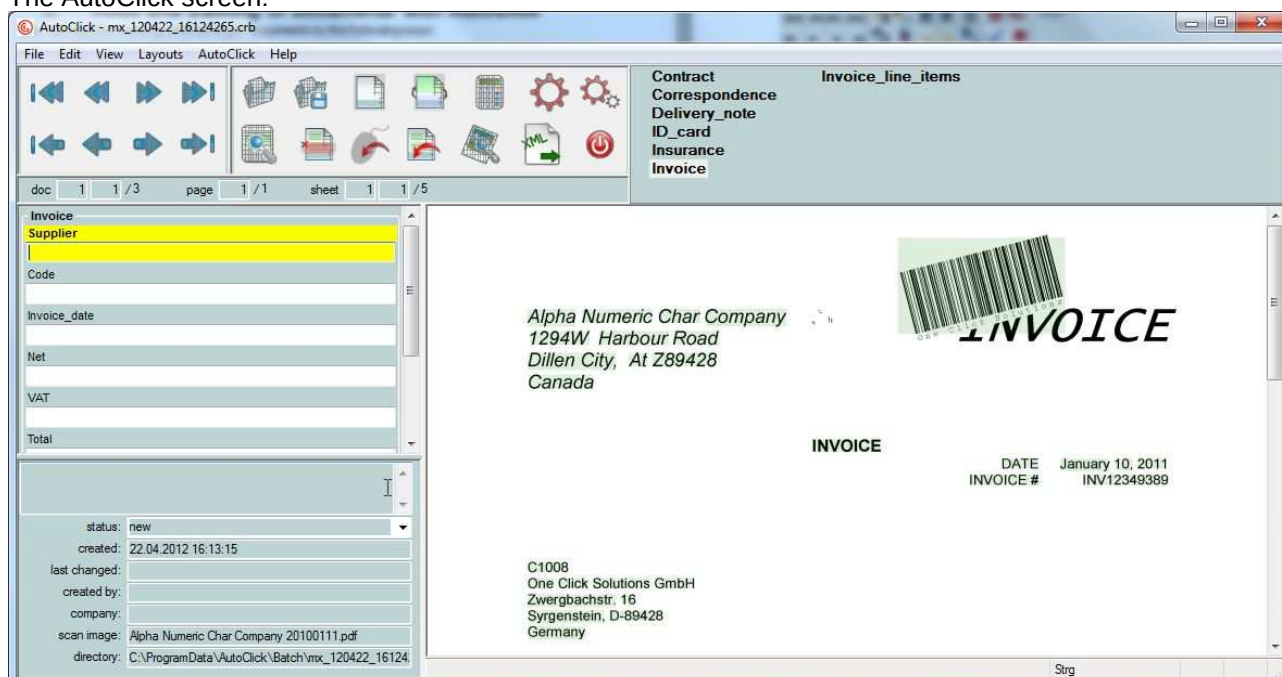


Manual start via the manual batch creation (ClickScanner):



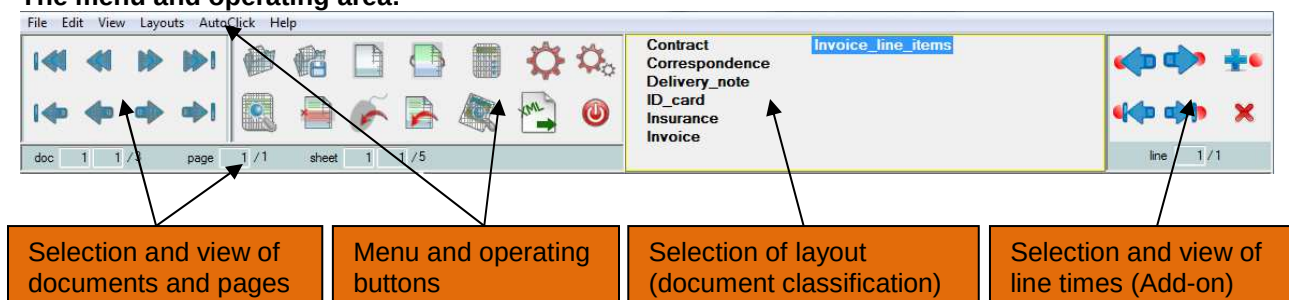
The completion of the document batch processing steps "manual batch creation" or "automatic batch creation" is required to initiate the data capture help process with AutoClick. On the other hand Optical Character Recognition (OCR) has not been performed and as such data/information cannot be captured.

The AutoClick screen:



The AutoClick screen is divided roughly into 3 sections:

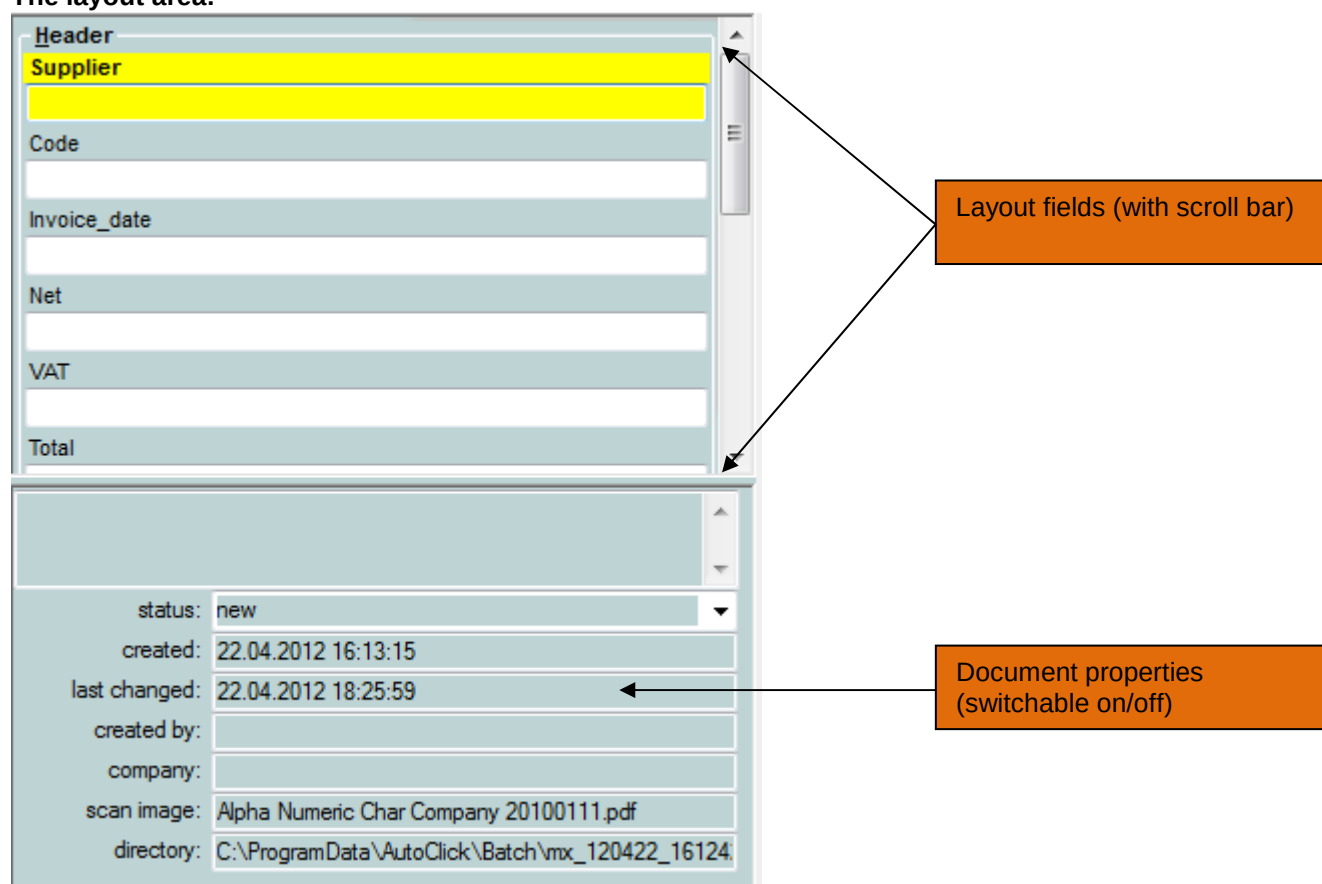
The menu and operating area:



The operation area contains all current executable functions (menus); the functions that are used most often can be selected directly via buttons (simpler and quicker operation).

In addition, all available document types (such as invoices, delivery notes, inquiries etc...) are listed here. The document types classify the documents into categories. Each document type can have different capture fields.

The layout area:



The layout area contains the fields that are to be captured, which are either to be created in advance with the Layout Editor or are preset automatically by the back office system (this is the case if it is integrated into a back office system).

The document area: it's the biggest area where the current page is shown.



The size of the window and the size of the page aperture can be varied and adjusted to the monitor.

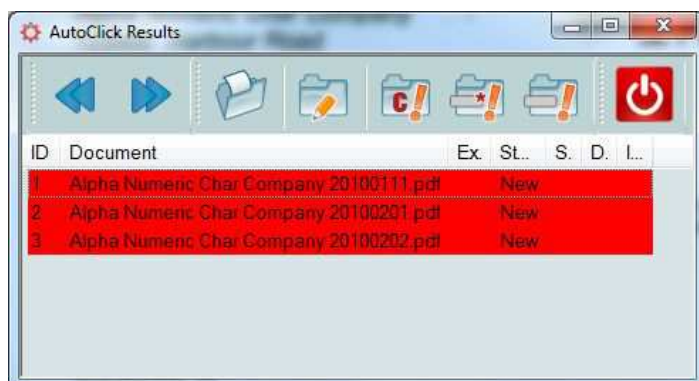
AutoClick itself is a learning capturing tool. You have to “show” the tool what kinds of documents of a supplier it should recognize and which layout field should be filled with information/data from the documents. That is the training. The training proceeds in three rather four steps:

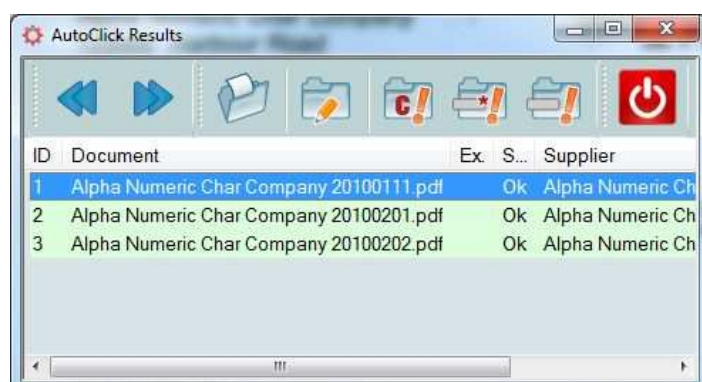
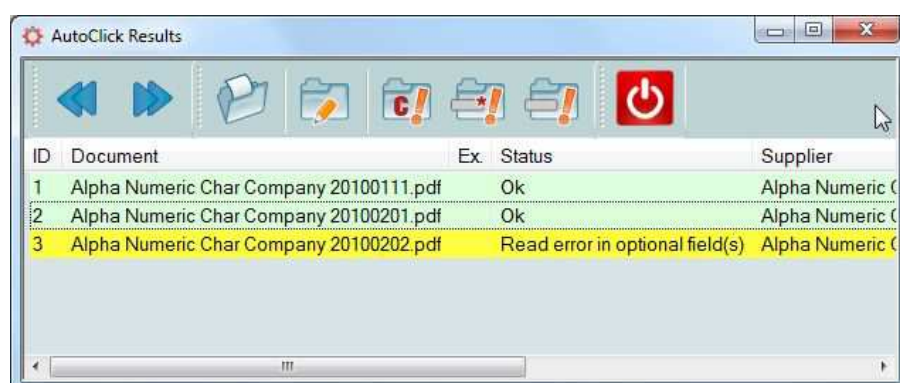
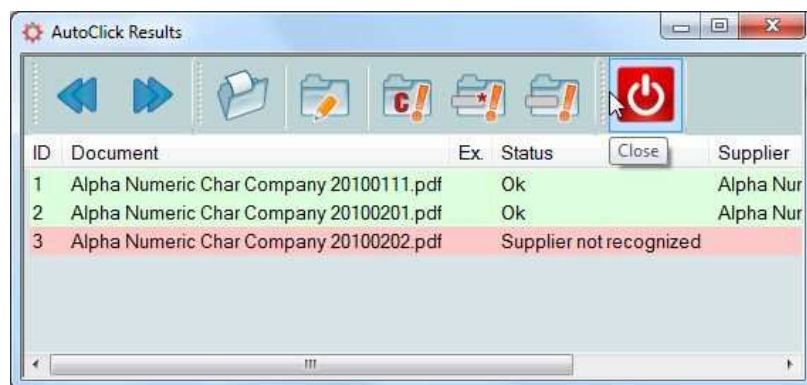
- train the supplier
- train the document type of the supplier
- train the layout fields of the document type
- train the line items (the Add-on “line Item capturing” is needed)

Once being trained documents can be automatically captured (i.e. to read a document) and the trained fields will be automatically filled

As a result you get the AutoClick Results Table where you easily can see what AutoClick has recognized. Every document is either marked red, yellow or green and added with a comment that shows the status:

- red: the document doesn't match to any trained supplier
- yellow; not all trained layout fields could have been found
- green: all trained layout fields where found





But before we have a closer look to the details of training and reading documents we explain the basic functions using AutoClick.

5.1. Basic elements of Data Capture

Contract
Correspondence
Delivery_note
ID_card
Insurance
Invoice

Invoice_line_items

The first step is the selection of the desired document type. This is performed by double clicking the corresponding document type in the upper right hand screen section (Operations Area).

The selected document type is highlighted and the associated entry fields are listed in the layout area.

All information in the document that can be selected (and as such that can be captured) is highlighted with a green background. This information can now be captured simply per

- mouse click
- dragging the mouse (several blocks located one after another) or
- mouse click while the Ctrl button is pressed (when capturing several blocks that are not located directly next to each other or in sequence).

When “dragging the mouse” the mouse can be dragged from left to right and right to left or diagonally. The best starting point is the point that is furthest from the next green field (simply because one can navigate with less accuracy and navigate more quickly).

The background color of the information that will be captured will simply switch from green to red. So it is quite obvious whether you have captured the information you wanted or not:

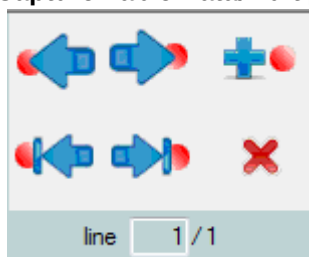


As soon the mouse clicks a green field the information is located in a framed box that is currently highlighted with a yellow background and the next field in the layout is activated (yellow background highlight)

Select input field

To skip an input field press the tab key. If a previous field is to be activated press the shift and tab key.

Capture Table Data/Multiple-Groups/Line item data (with Add-on “Line item capturing”)



AutoClick can capture line items or table rows (Multiple-Groups). Due to the fact that the number of items/table cells varies from document to document, the field's group can be selected anew multiple times; on a case by case basis. This is done during the capture process by selecting this button . To determine if a group can be added dynamically during the capture process or not is easily recognizable on the highlighted background color. Dynamic groups are highlighted in green (all other groups are highlighted in gray).

The capture process is identical to the process utilized for all the other fields.

Switching Layouts

Layouts can be switched to any available screen (screens for the document types) at any time online, during the data capturing process; while capturing data from a document. To switch to a different layout double click the desired document type.

During the switching process all of the completed fields that exist in both layouts are transferred to the new screen.

Save captured values

Capturing all fields in a layout is not a prerequisite to saving the captured data for a specific document. All mandatory fields of a layout (mandatory fields are defined during the creation of the layout with the Layout Editor) must be completed, otherwise the data/document cannot be saved.



Captured documents are saved by clicking the following button . In this case the document status switches to “completed/done”; at this point the capturing process cannot be continued. The captured values/data located in the layout fields are saved to a preset target location (CSV, XML, or SQL) and can be made available for processing in any number of applications.

Document Status

Each batch document is assigned statuses during and after the completion of the capturing process. Here is a list of the statuses:

- **open:** the document has not yet been captured and accordingly no data has been stored and if required transferred to another system.
- **in work:** the document has been captured in part i.e. the capturing process could not be completed in full, specifics must still be clarified. The user sets the status manually.
- **done/completed:** the document has been captured and the captured data/information has been transferred to a back office system for processing. The status is set automatically upon saving the document. 
- **deleted:** if a document is deleted from a batch the document can no longer be displayed in AutoClick. The document however had already been created during the preprocessing phase and stored in the data-database and the document status is set to “deleted” after the document has been deleted.

The definitions “open”, “in work”, “done/completed” can be modified to meet customer specifications in the OneClickSetting.ini file.

LookUp-Data (Supplement Master Data)

In many cases the capture process can be expedited and the data completed by adding lookup information from other data sources (CSV, XML, SQL).

For example in the case of invoice capture, the supplier number of the invoicing party is needed or special payment terms must be considered. This information can, for example, be provided by an ERP system and transferred during the capture process.

In addition, information can be imported and compared to the document data; for example has the bank account information or the address changed.

The LookUp data transfer settings are set in the OneClickSettings.ini file.

5.2. How to train with AutoClick

AutoClick is a learning capturing tool, which has to be trained before capturing automatically. At the beginning AutoClick doesn't "know" anything, because nothing has been trained. I.e. AutoClick will not recognize any supplier or document type or layout field.

The training is very simple and doesn't afford any software know how or programming knowledge. Due to its flexibility you can also easily modify the training.

In average it takes about 1-2 minutes to train a document type of a supplier. Having trained a document type it makes no difference whether the document type arrives every day or once a year. So the number of one document type really doesn't matter. Just train and forget about the document type.

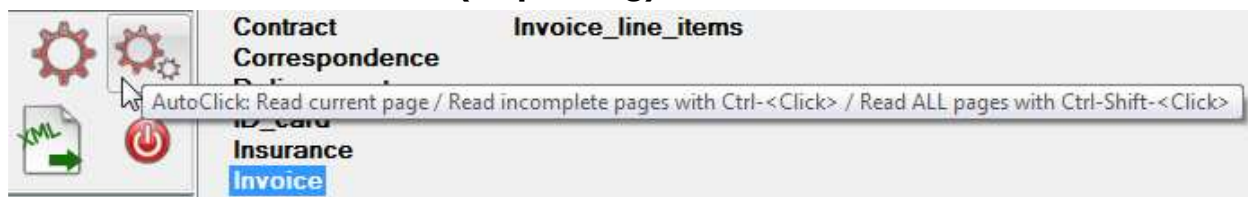
What kind of document types can be trained: the document types that should be trained have to have a certain kind of form or layout, e.g. like invoices, delivery notes, orders, offers, claims or contracts. The length of these documents can vary; also the information which has to be detected can stand at different positions.

Ordinary correspondence, which normally is of individual style and form, will not be successfully trained. In this case you just click the information in the fields you want to

Training with AutoClick means that you have to define reference and coordination data for information which has to be captured into a layout field. And the way you do it is very easy: you just click on the green boxes in your analyzed document.

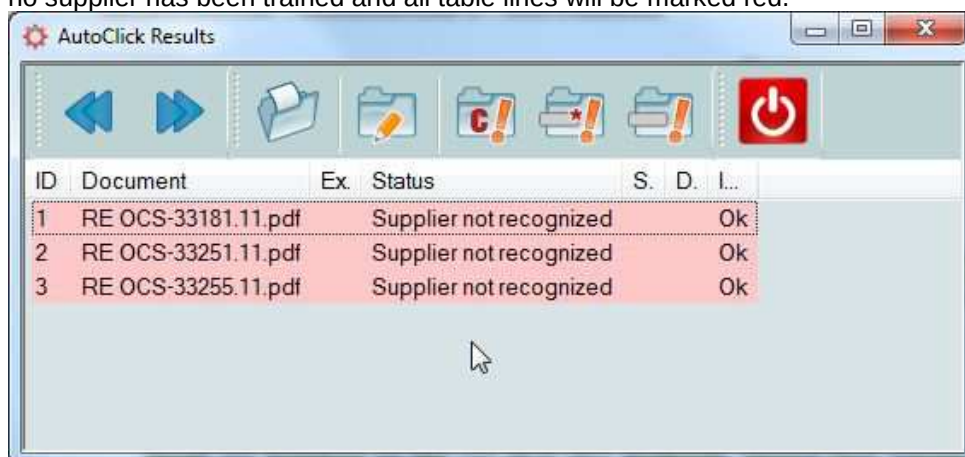
In the first step you start with an AutoClick Read to capture information from your batch of documents.

5.3. Automatic Read (Capturing)



With the  button you start the AutoClick Read function for the current page (Read all pages of the current batch with Ctrl + Read button).

The first time AutoClick Read will not find any information/data matching to one the layout field of a document type. So the result in the AutoClick Results table (opened in a separate window) will tell that no supplier has been trained and all table lines will be marked red.

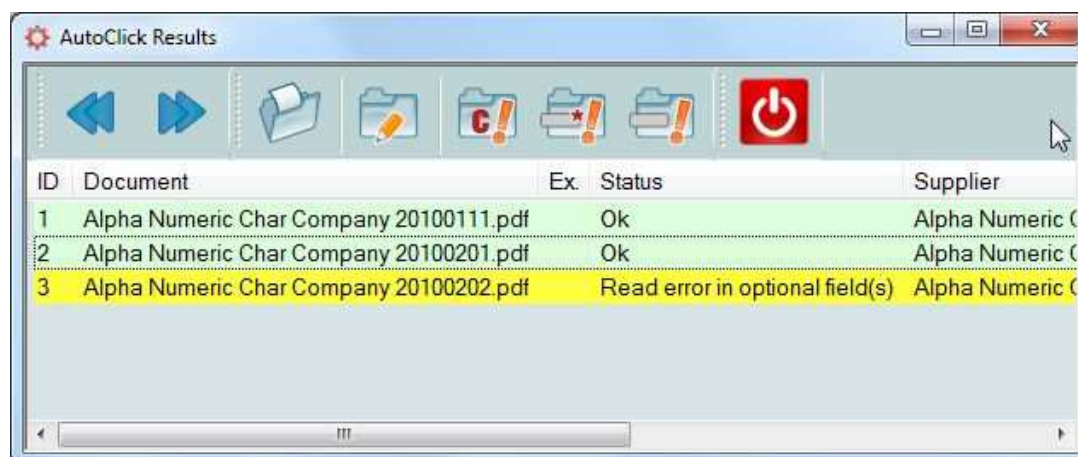


When you have trained suppliers, document types and layout fields and then start the AutoClick Read function you will probably get a different result.

If AutoClick was able to find all for all trained layout fields data and if all suppliers and document types were found the result table will show only lines marked green.

If only some trained layout fields of a document were found then the table line will be marked yellow and status will inform you which layout fields were not found.

If a document doesn't match with any trained supplier or trained document type then the table line for this document will be marked red:



ID	Document	Ex.	Status	Supplier
1	Alpha Numeric Char Company 20100111.pdf		Ok	Alpha Numeric C
2	Alpha Numeric Char Company 20100201.pdf		Ok	Alpha Numeric C
3	Alpha Numeric Char Company 20100202.pdf		Read error in optional field(s)	Alpha Numeric C

With a double click on any table line (document page) in the AutoClick Results table the table will be closed and the selected document will be opened in the main window of AutoClick. Now you can modify the training or start with the training for this document.

Information: If you are sure that the form of the selected document is of unique character and it will not make any sense to train this document then you can capture the information for the layout field just by clicking on the target information in the document (click on or in the green boxes). As soon as you have captured one layout field the cursor will jump to the next layout field and you just have to click on a green box to capture the information in the box.

5.4. Training of suppliers, document types and layout fields

Training with AutoClick is done in three steps:

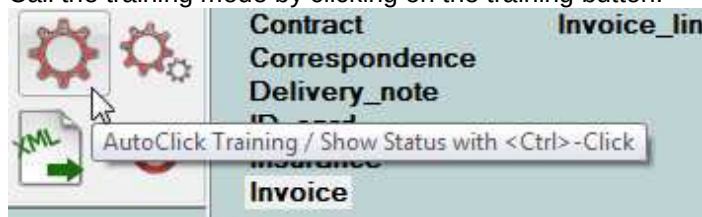
- a. train the supplier
- b. train the document type
- c. train the layout field(s)

The formal way of training in each step is quite similar. First you specify the target information then you specify references to the target information by clicking on the green boxes you want to define as a reference.

Before you start you select the layout in AutoClick which you want to train!

Let's start:

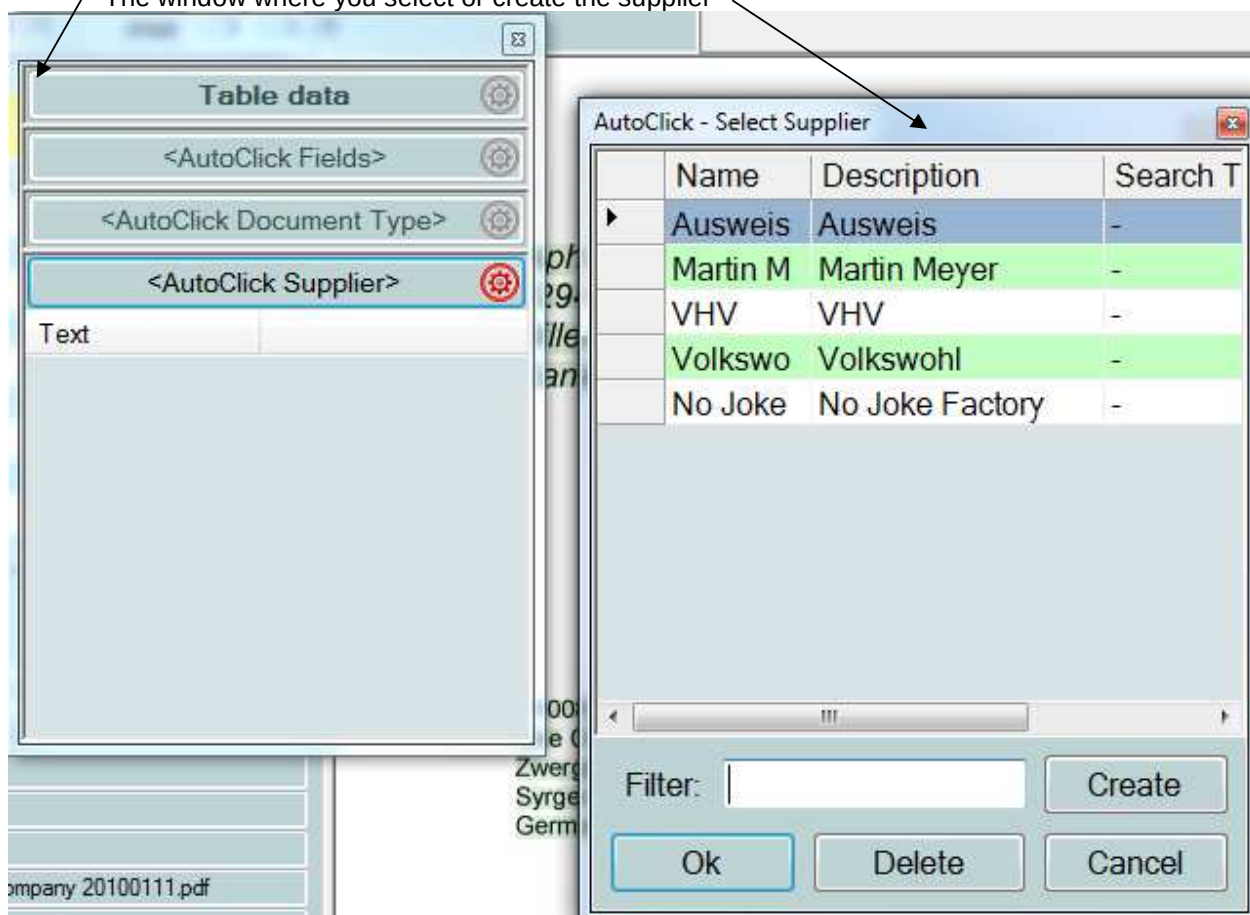
Call the training mode by clicking on the training button:



5.4.1. Train a supplier

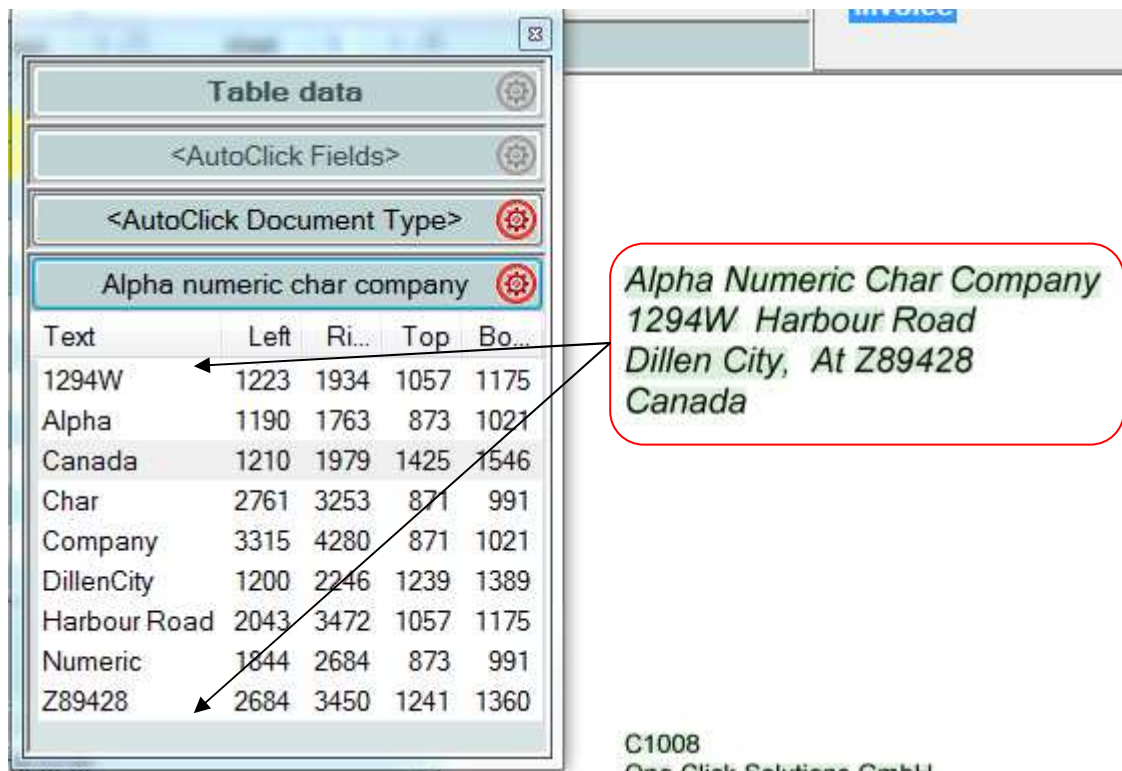
Two new windows will be opened:

- The window with the menus supplier, document type, fields and table data
- The window where you select or create the supplier



In the select supplier window (which is empty when you start with the first training) you type the supplier's name you want to train. Then you confirm with "create" This window will close then.

Now you have to make the references which tell AutoClick how it shall "recognize" this supplier in the future. Quite often you can click now on the different address parts of the supplier:



The screenshot shows the 'AutoClick Document Type' training window. It contains a table with the following data:

Text	Left	Right	Top	Bottom
1294W	1223	1934	1057	1175
Alpha	1190	1763	873	1021
Canada	1210	1979	1425	1546
Char	2761	3253	871	991
Company	3315	4280	871	1021
DillenCity	1200	2246	1239	1389
Harbour Road	2043	3472	1057	1175
Numeric	1844	2684	873	991
Z89428	2684	3450	1241	1360

A callout box on the right contains the text: *Alpha Numeric Char Company
1294W Harbour Road
Dillen City, At Z89428
Canada*

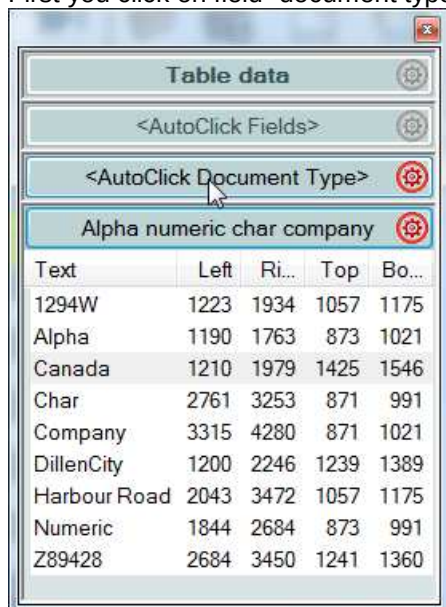
In average it is sufficient to name 3-5 references.

Notice: there is a setting in the configuration where you can specify how many of your references have to be found to be sure that the supplier is the trained one. By default the setting is 50%!

Now the supplier has been trained.
So we come to the next step: train the document type.

5.4.2. Train a document type

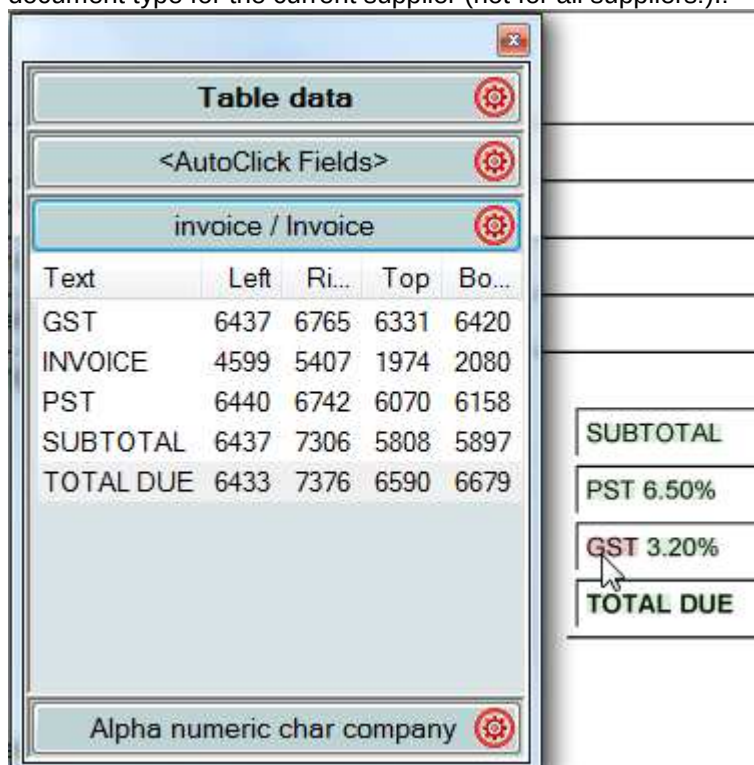
This is quite similar as the training for the supplier:
First you click on field "document type" in the open training window:



The screenshot shows the 'AutoClick Document Type' training window. The 'AutoClick Document Type' field is selected, and the table of data is visible below it.

Text	Left	Right	Top	Bottom
1294W	1223	1934	1057	1175
Alpha	1190	1763	873	1021
Canada	1210	1979	1425	1546
Char	2761	3253	871	991
Company	3315	4280	871	1021
DillenCity	1200	2246	1239	1389
Harbour Road	2043	3472	1057	1175
Numeric	1844	2684	873	991
Z89428	2684	3450	1241	1360

The list window for the document type of the current supplier will be opened. You type the name of the document type you want to train, e.g. invoice, delivery note, correspondence, contract. You click on "create", the window will close and now you click on the terms which shall specify the document type for the current supplier (not for all suppliers!):



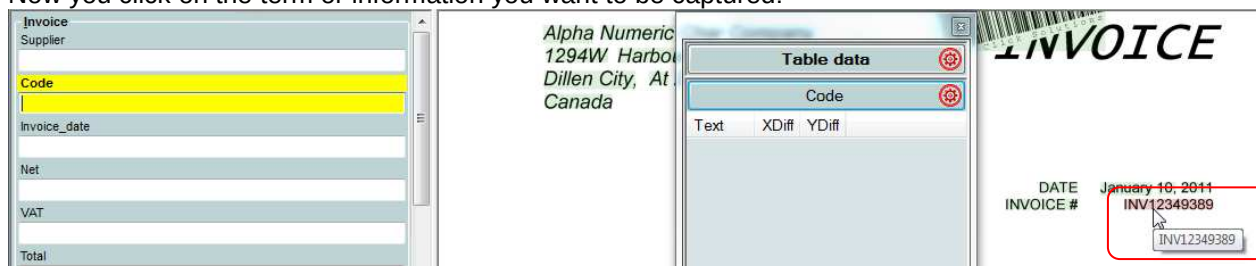
You always select terms which belong to the form of the document type and which will probably not be found on other document types of the same supplier.

5.4.3. How to train fields

In this step the training is a bit different.

First you make this field sensitive that you want to train now. Just make a mouse click on the field and it will turn yellow.

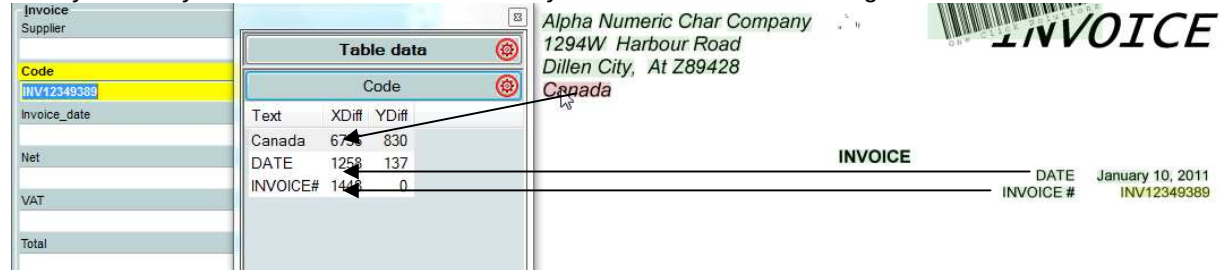
Now you click on the term or information you want to be captured:



The captured information will be transferred to the current field:



Now you click your references as before. They will be listed in the training window:



To train the other fields proceed as before.

On top there 3 more alternatives to train fields:

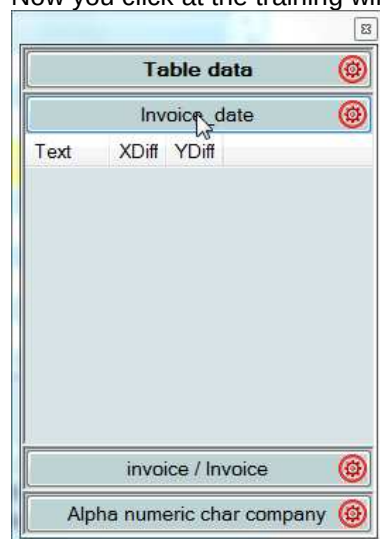
- A. Per fix position on the form
- B. Per regular expression
- C. Per fix position and regular expression (sequential in both ways)

A. Per fix position

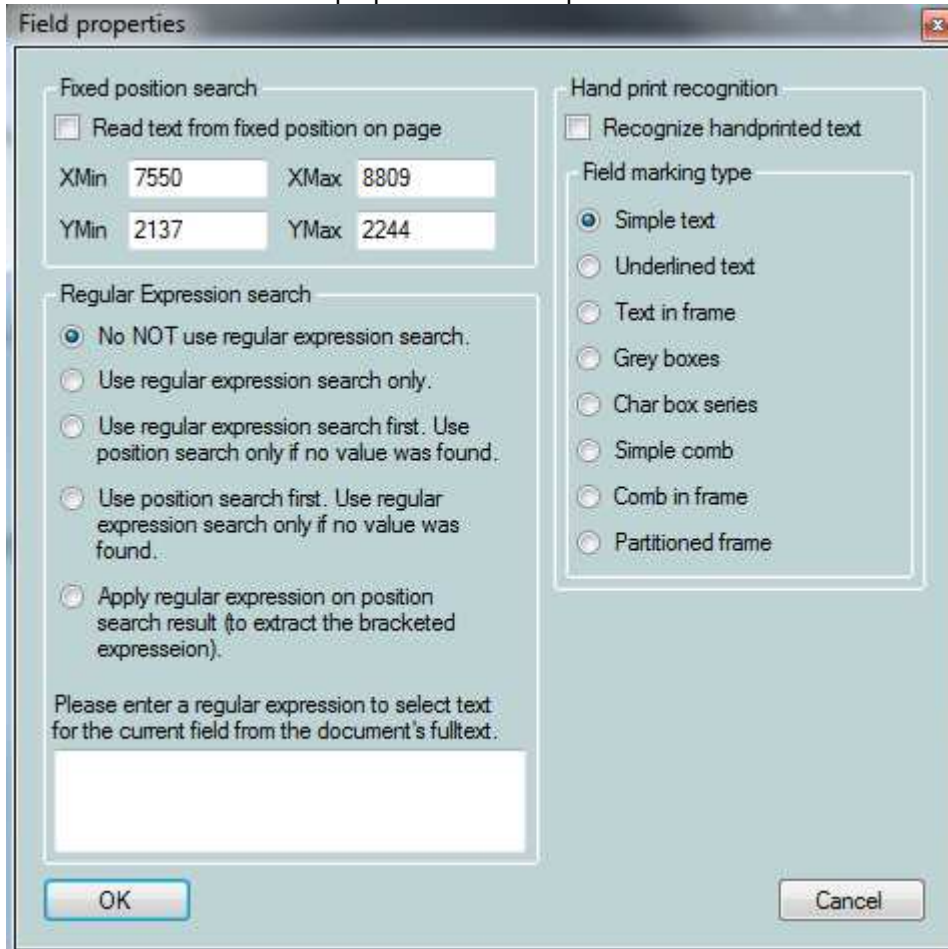
There are cases where you cannot reference a target value or term. But the target term is always positioned at the same place of a document. Then you can choose this alternative.

The first steps to train the value remain the same: click on the field which you want to train (it will become yellow), then click on the target value and it will be transferred to the yellow field.

Now you click at the training window at the current field name (e.g. "invoice date"):



A new window called "Field properties" will be opened:



Here you tick the checkbox at the top to give AutoClick to fetch the target value from the position shown below.

B. Per regular expression

Alternative a field can also be filled per regular expression. In this case you have to state the regular expression and AutoClick will search on the current document for an expression which matches to the expression.

The expression has to be written in the frame at the bottom of the same window.

C. Per fix position and regular expression (sequential in both ways)

On top it is possible to mix A. and B. in both sequent ways: either search first for the fix position and the regular expression or vice versa. For both ways you have to tick one of the listed checkboxes.

5.4.4. Finish a training



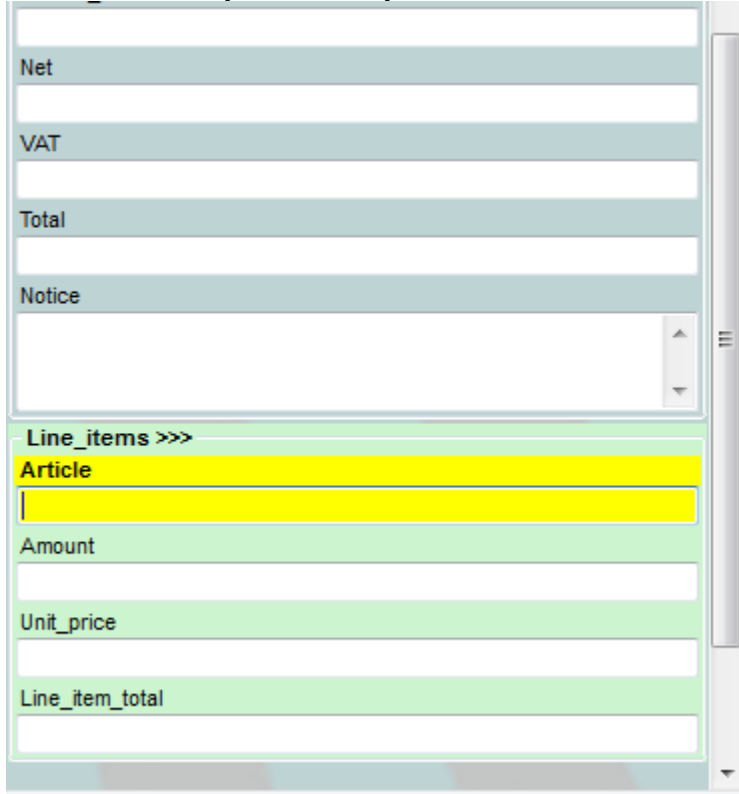
To finish training you just click on the training button

5.5. Train line items with dynamic length

Therefore you need the Add-on „line item capturing“ which is not included in the basic AutoClick license.

This Add-on reads line items i.e. table data in any document type. In most cases this will be line items of invoices but it could also be financial advises etc.

To train line items you need a layout with line items / table data:



The screenshot shows a layout editor window. It contains several input fields with labels: 'Net', 'VAT', 'Total', 'Notice', 'Line_items >>>', 'Article', 'Amount', 'Unit_price', and 'Line_item_total'. The 'Line_items >>>' section and its sub-fields are highlighted with a light green background. The 'Article' field is highlighted with a yellow background. A vertical scrollbar is visible on the right side of the form.

Table data groups in layout can be easily recognized: they have a green background (all others have gray or gray green background). How to create a table data group in a layout read in the chapter “Layout editor”.

So first you switch again to the training mode, choose the current supplier and document type.

Then make any field in the line item group of your layout sensitive (so it turn yellow).

The procedure for training line items is:

- Select Table data in your training window
- Show the size of a complete line item
- Make the references for the header of table data (where does it start?)
- Make the references for the footer of the table data (where does it end?)
- If the table data is more than one page long you have to train how the table data ends on a page (>>> field “Carry-forward” in the training window)
- If the table data is more than one page long you have to train how the table data starts on a page (>>> field “Carry-over” in the training window)
- Train the table fields

So let's start:

Select Table data in your training window

Then start the training by clicking the field "Table data" in your training window:



Next you click the field „Table Fields“ in the same window:

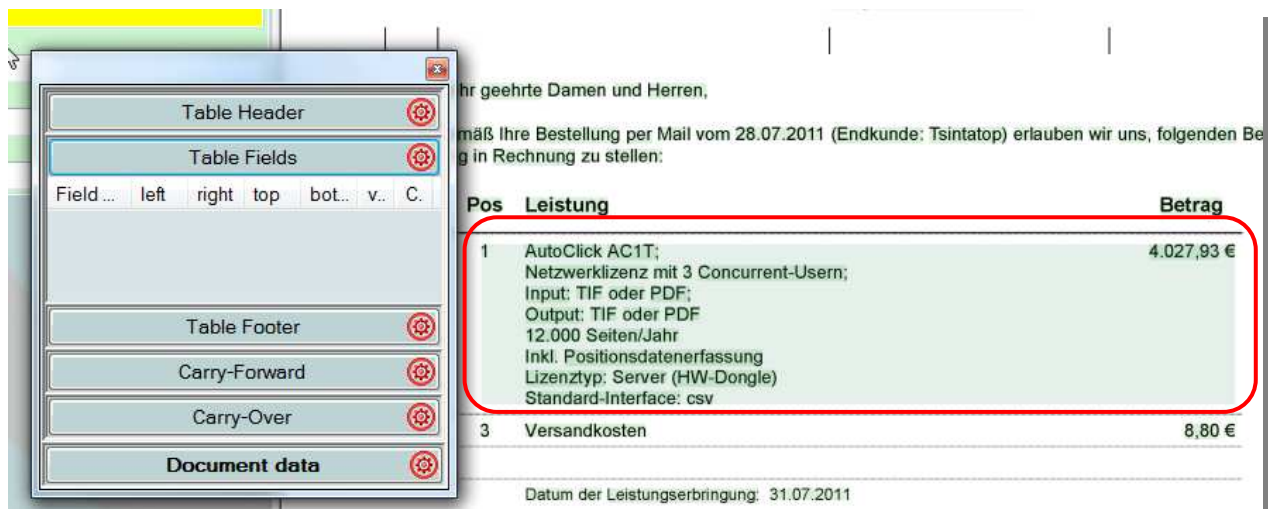


Show AutoClick the size of a complete line item

Now you have to "show" AutoClick how a complete line item looks like. So click again on the field "Table Fields" in the training window.

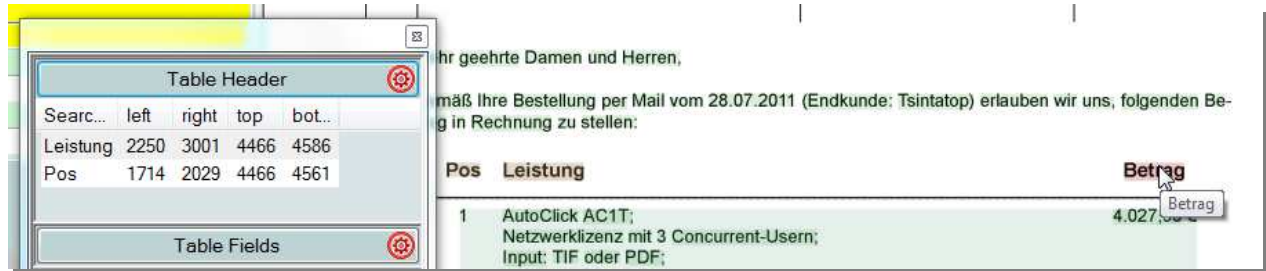


Then keep the key "Alt" on your keyboard pressed while covering a zone with your mouse over a whole line item. When you let loose mouse and Alt key the zone turns green:



Make the references for the header of table data (where does it start?)

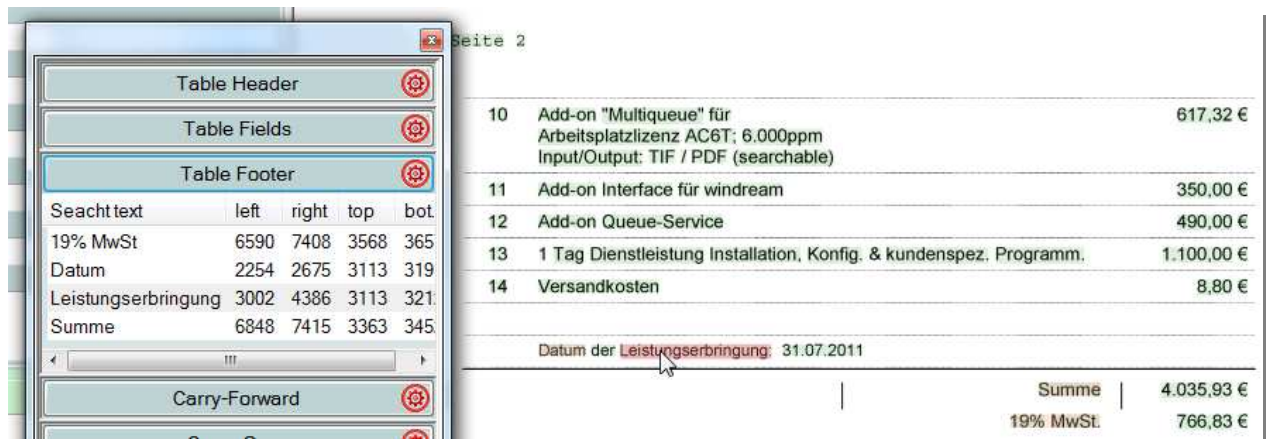
Click the field “Table Header” in the training window and then click on all the terms and information which stand above the table data.



The references are marked in red color.

Make the references for the footer of the table data (where does it end?)

Now you click on the field “Table Footer” in the training window and make the references for the end of the table data:



The references are marked in red color.

Train the field “Carry-Forward” in the training window

In case the table data is longer than one page you have extra to “show” AutoClick how a table data ends on a page.

Click the field “Carry-Forward” in the training window and make references at the bottom of the page beyond the table data:

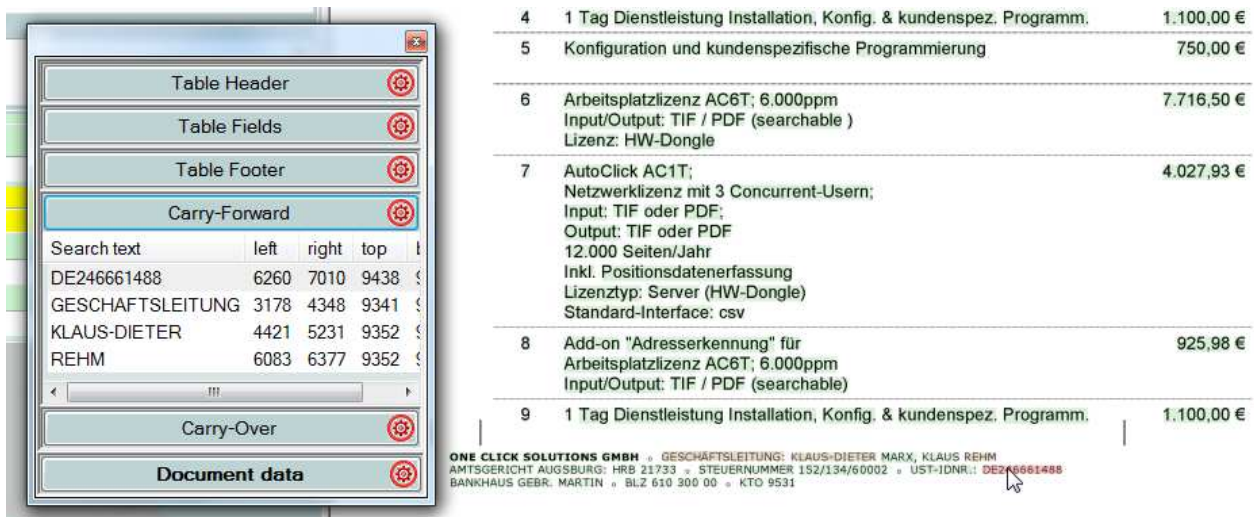


Table Header	Table Fields	Table Footer	Carry-Forward	Carry-Over	Document data
Search text	left	right	top		
DE246661488	6260	7010	9438		
GESCHAFTSLEITUNG	3178	4348	9341		
KLAUS-DIETER	4421	5231	9352		
REHM	6083	6377	9352		

4	1 Tag Dienstleistung Installation, Konfig. & kundenspez. Programm.	1.100,00 €
5	Konfiguration und kundenspezifische Programmierung	750,00 €
6	Arbeitsplatzlizenz AC6T; 6.000ppm Input/Output: TIF / PDF (searchable) Lizenz: HW-Dongle	7.716,50 €
7	AutoClick AC1T; Netzwerklicenz mit 3 Concurrent-Usern; Input: TIF oder PDF; Output: TIF oder PDF 12.000 Seiten/Jahr Inkl. Positionsdatenerfassung Lizenztyp: Server (HW-Dongle) Standard-Interface: csv	4.027,93 €
8	Add-on "Adresserkennung" für Arbeitsplatzlizenz AC6T; 6.000ppm Input/Output: TIF / PDF (searchable)	925,98 €
9	1 Tag Dienstleistung Installation, Konfig. & kundenspez. Programm.	1.100,00 €

ONE CLICK SOLUTIONS GMBH • GESCHAFTSLEITUNG: KLAUS-DIETER MARX, KLAUS REHM
AMTSGERICHT AUGSBURG: HRB 21733 • STEUERNUMMER 152/134/60002 • UST-IDNR.: DE246661488
BANKHAUS GEBR. MARTIN • BLZ 610 300 00 • KTO 9531

Train the field "Carry-Over" in the training window

As you trained the field "Carry-Forward" you train the beginning of a table data at the following pages of a document.

Click the field "Carry-Over" in the training window and make references at the bottom of the page beyond the table data:

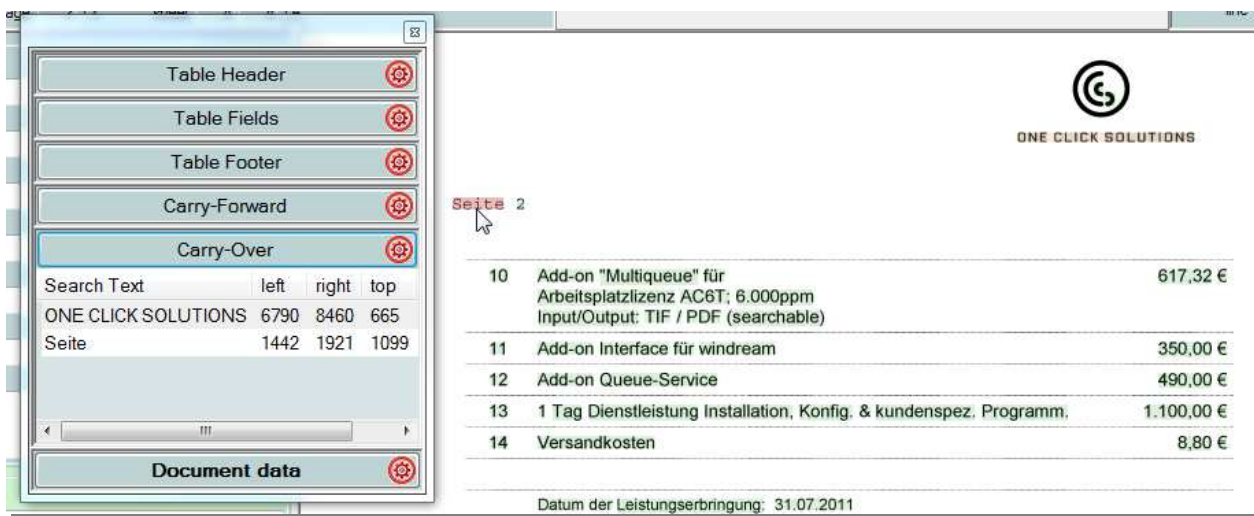


Table Header	Table Fields	Table Footer	Carry-Forward	Carry-Over	Document data
Search Text	left	right	top		
ONE CLICK SOLUTIONS	6790	8460	665		
Seite	1442	1921	1099		

10	Add-on "Multiqueue" für Arbeitsplatzlizenz AC6T; 6.000ppm Input/Output: TIF / PDF (searchable)	617,32 €
11	Add-on Interface für windream	350,00 €
12	Add-on Queue-Service	490,00 €
13	1 Tag Dienstleistung Installation, Konfig. & kundenspez. Programm.	1.100,00 €
14	Versandkosten	8,80 €

Datum der Leistungserbringung: 31.07.2011

Train the table data fields:

To train the table data fields you start with the anchor field. This is the value in the table data by which AutoClick recognizes where a line item starts. In many cases this will be the amount at the end of a line item.

So you activate the according field in the line item section of your layout (the field will turn yellow). Then you click on the anchor value in your document table data.

In contrast to the ordinary fields here the value will not be transported into the layout field. But the name of the layout field will be written in the section beyond the field "Table Fields" in the training window.



Table Header

Table Fields

Field name	left	right	top	bot...	ve
Line_item_total	7983	8620	4771	4874	N

Table Footer

Carry-Forward

Carry-Over

Table Header

Table Fields

Field name	left	right	top	bot...	ve
Line_item_total	7983	8620	4771	4874	N

Table Footer

Carry-Forward

Carry-Over

Document data

Pos Leistung Betrag

1	AutoClick AC1T; Netzwerklicenz mit 3 Concurrent-Usern; Input: TIF oder PDF; Output: TIF oder PDF 12.000 Seiten/Jahr Inkl. Positionsdatenerfassung Lizenztyp: Server (HW-Dongle) Standard-Interface: csv	4.027,93 €
2	Add-on Interface für windream	350,00 €
3	Add-on Queue-Service	490,00 €

Now you click the next field in the current layout to be trained.
By the same procedure as before you now train the other fields.

In many cases there is mostly in one column of a table data a text (e.g. article description) which varies in its length from line item to line item.

So when it comes to the training of such a field you cannot just click a value. You have to catch somehow the whole text length: keep the key "Alt" on your keyboard pressed while covering a zone with your mouse over a whole line item. When you let loose mouse and Alt key the zone turns green.



Code

RE 33251.11

Invoice_date

Net

VAT

Total

4.802,76

Notice

Line_items >>>

Article

Amount

Table Header

Table Fields

Field name	left	right	top	bot...	ve
Article	2238	5195	4771	5812	N
Line_item_total	7983	8620	4771	4874	N

Table Footer

Carry-Forward

Carry-Over

Document data

Pos Leistung Betrag

1	AutoClick AC1T; Netzwerklicenz mit 3 Concurrent-Usern; Input: TIF oder PDF; Output: TIF oder PDF 12.000 Seiten/Jahr Inkl. Positionsdatenerfassung Lizenztyp: Server (HW-Dongle) Standard-Interface: csv	4.027,93 €
3	Versandkosten	8,80 €

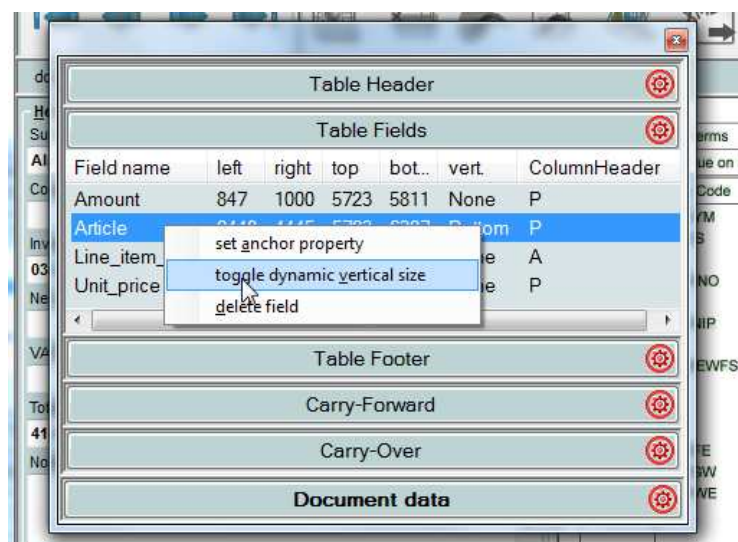
Datum der Leistungserbringung: 31.07.2011

Summe	4.035,93 €
19% MwSt.	766,83 €
Endbetrag	4.802,76 €

Bitte überweisen Sie den Betrag auf unser Konto Nr. 9531 bei Bankhaus Gebr. Martin (BLZ: 610 300 | BIC: MARI3333 | IBAN: DE44 2512 0510 0006 0005 34) ohne Abzug bis zum 16.08.2011

When you have trained all fields of a table data section in a layout you can specify which field has static length and which have a variable length.

Navigate the mouse on a trained field name in the field "Table Fields" in the training window and click the right mouse push-button. A new sub-window will open in which you can specify the variable length ("toggle dynamic vertical length")



When you do so the value in the column „vertical“ will switch from „None“ to „Bottom“:

Field name	left	right	top	bot..	vert	ColumnHeader
Amount	847	1000	5723	5811	None	P
Article					Bottom	P
Line_item					None	A
Unit_price					None	P

In addition and by the same method you can also later change the anchor field. Which current field is declared as anchor field you can easily see in the column "ColumnHeader": there is just one "A" and it stand for "anchor".



You finish the table data training via the button

5.6. Detection errors / recognition errors

If a supplier, document type or field has not been recognized by AutoClick the reason might be that the training has not been precise enough. To check this switch to the training mode.

Choose the training window in which the error has been occurred (supplier, document type or field). If it is a field then click on the field in the layout. The references in the training window will be refreshed automatically.

The training window then will show which references have been found (white) and which not (red):



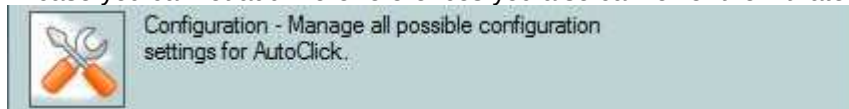
Text	XDiff	YDiff
1.400.00	64	515
297.92	2	-262
9.310.00	71	254
GST 3.20%	1698	-262
PST 6.50%	1706	0

invoice / Invoice

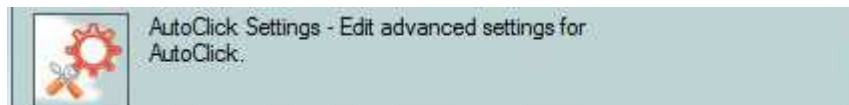
Alpha numeric char company

The reason for a training error might be:

- You have chosen references which are only on the trained document and not on the faulty document (way out: eliminate the reference or add other references).
- You have chosen references which are dynamic like values (e.g. the value of a total sum or VAT which are different on each document) (way out: refer on static terms).
- The OCR has made an error and could not detect a term proper (way out: just click the value into the field).
- In case you cannot add more references you also can lower the hit rate in the configuration:



>>>



>>>

>Main menu >Configuration

← → ✓ 

Min. hit rate for the recognition of suppliers

50

Min. hit rate for the recognition of suppliers (percentage from 1 to 100)

Min. hit rate for the recognition of document types

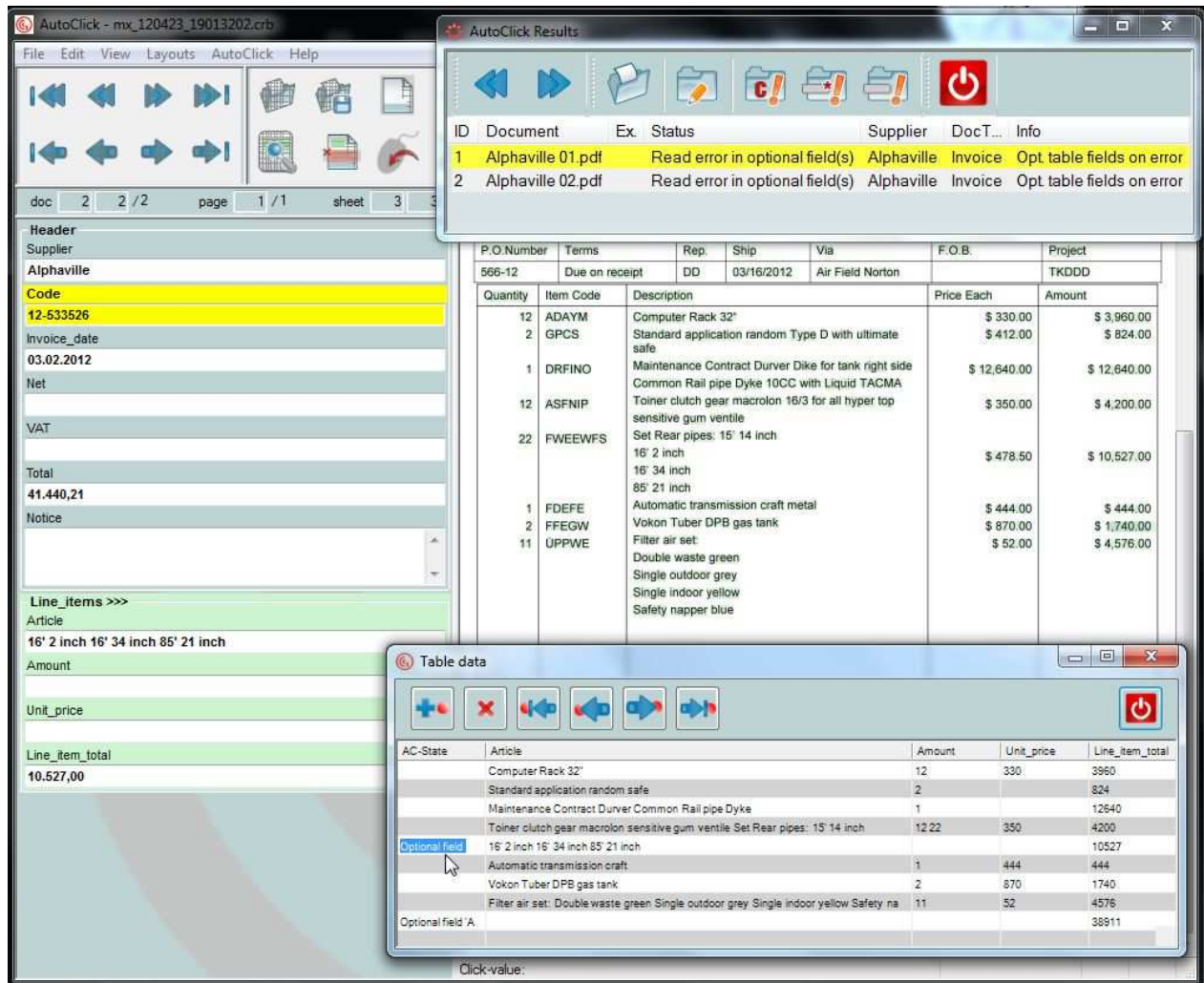
50

Min. hit rate for the recognition of document types (percentage from 1 to 100)

Errors in line items:

If there is an error in a line item you get two messages to find easily the target item. In the AutoClick result list the document will highlighted in yellow with the message "Optional table fields on error". Now you don't know in which line and which field the error has happened.

Here you get assistance: the table data result list: it shows all captured fields in lines and columns. In addition there is a first column named "AC-State". All fields are empty in this column except there is a fault. Now you just follow the line and look what is wrong:



The screenshot displays the AutoClick software interface. The main window shows a document titled 'Alphaville 01.pdf' with a status of 'Read error in optional field(s)'. The 'AutoClick Results' window lists two documents, both with the error 'Read error in optional field(s)'. The 'Table data' window shows a detailed list of line items with columns for AC-State, Article, Amount, Unit_price, and Line_item_total. The error is highlighted in the 'Optional field' row.

ID	Document	Ex.	Status	Supplier	DocT...	Info
1	Alphaville 01.pdf		Read error in optional field(s)	Alphaville	Invoice	Opt table fields on error
2	Alphaville 02.pdf		Read error in optional field(s)	Alphaville	Invoice	Opt table fields on error

Quantity	Item Code	Description	Price Each	Amount
12	ADAYM	Computer Rack 32"	\$ 330.00	\$ 3,960.00
2	GPCS	Standard application random Type D with ultimate safe	\$ 412.00	\$ 824.00
1	DRFINO	Maintenance Contract Durver Dike for tank right side	\$ 12,640.00	\$ 12,640.00
12	ASFNIP	Common Rail pipe Dyke 10CC with Liquid TACMA	\$ 350.00	\$ 4,200.00
22	FWEEWFS	Toiner clutch gear macrolon 16/3 for all hyper top sensitive gum ventile	\$ 478.50	\$ 10,527.00
1	FDEFE	Set Rear pipes: 15' 14 inch	\$ 444.00	\$ 444.00
2	FFEGW	Automatic transmission craft metal	\$ 870.00	\$ 1,740.00
11	UPPWE	Vokon Tuber DPB gas tank	\$ 52.00	\$ 4,576.00
		Filter air set: Double waste green		
		Single outdoor grey		
		Single indoor yellow		
		Safety napper blue		

AC-State	Article	Amount	Unit_price	Line_item_total
	Computer Rack 32"	12	330	3960
	Standard application random safe	2		824
	Maintenance Contract Durver Common Rail pipe Dyke	1		12640
	Toiner clutch gear macrolon sensitive gum ventile Set Rear pipes: 15' 14 inch	12 22	350	4200
Optional field	16' 2 inch 16' 34 inch 85' 21 inch	1		10527
	Automatic transmission craft	1	444	444
	Vokon Tuber DPB gas tank	2	870	1740
	Filter air set: Double waste green Single outdoor grey Single indoor yellow Safety na	11	52	4576
Optional field *A				38911

5.7. Delete a training

Trainings of suppliers, document types and fields can always be easily deleted.

Just switch in the training mode.

To delete a trained supplier or document type: click on the supplier or document type in the training window and delete the one you want to.

To delete a trained field: click with the mouse on the layout field you want to delete. Open the field in the training window. A double click on a reference will immediately delete the reference.

Notice: you cannot undo a deletion of training!

5.8. Menu and Function Overview (AutoClick)

The following menus i.e. functions are available (fields highlighted with a green background can be selected via buttons):

Level 1	Level 2	Level 3
File	Open batch	
	Close batch	
	Edit open invoice	
	Export batch	
	Exit	
Edit	Set document status	in work Done Open
	Go to	First document Previous document Next document Last document First page Previous page Next page Last page
	Table data	First line
		Previous line
		Next line
		Last line
		Create new line
		Delete line
		Show table data
	LookUP	Search in Lookup Table
		Update Lookup Table
		Search in data table
		Copy from previous document
	Save document	
	Delete	Delete current field
		Reset current field
		Undo last click
		Delete all fields in the current group
		Reset document
		Delete page
		Delete document
View	Show DATA	
	Show position data	
	Zoom	Zoom to block
		Zoom 25%
		Zoom 50%
		Zoom 100%
		Zoom 200%
		Best fit
		Page width

		Page height
	Scroll	Scroll Up
		Scroll Down
		Scroll To the left
		Scroll To the right
		Scroll To Top
		Scroll To Bottom
		Home
		End
	Show page list	
	Calculator	
	Block info on/off	
	Log window on/off	
	Properties on/off	
	Show scan image	
Layouts	Load layout	
	Load previous layout	
AutoClick	Training	
	Read current page	
	Read all pages	
	Show results	
Help	Online Help	
	About	

5.8.1. File (AutoClick)

Open Batch

The “**File / Open Batch**” function opens a batch. To do so a window screen is opened and a directory and batch can be selected. To confirm press the button “open”.

Close Batch

The “**File / Close Batch**” function closes a batch. There is no safety interrogation.

Open Documents for review

The “**File / Open Documents for Review**” opens the original files in order to compare or search for certain information.

Export Batch

The “**File / Export Batch**” function exports a batch. This function has to be licensed extra.

Exit

The “**File / Exit**” function exits the application. There is no safety interrogation.

5.8.2. Edit (AutoClick)

Set document status

Each batch document is assigned statuses during and after the completion of the capturing process.

The user can set the following statuses:

- **in work:** the document is being captured and the capture process has not yet been completed. The user can also set the status manually.
- **done:** the document has been captured and the captured data/information has been transferred to a back office system for processing. The status is set automatically upon saving the document. The user can also set the status manually.
- **being clarified:** the document has been captured in part i.e. the capturing process could not be completed in full, specifics must still be clarified. The user sets the status manually.

The definitions "open", "being clarified", "done/completed" can be modified to customer specifications in the OneClickSetting.ini file.

Go to

This function can jump to any page or document in the current batch and displays the associated page. The following Go to functions exist:

- **First document**
- **Previous document**
- **Next document**
- **Last document**
- **First page**
- **Next page**
- **Previous page**
- **Last page**

Table Data

The menu sub-function "**Table data**" processes/edits layout groups with the characteristic capture table data (is defined in the Layout Editor during the definition of the layout screen). A table data record is defined as a row (corresponds to an item row).

The specific functions:

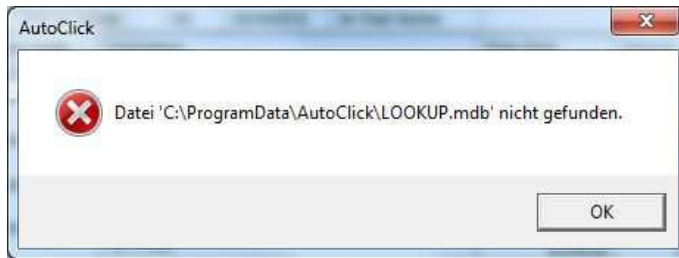
- **first line**
- **previous line**
- **the next line**
- **last line**
- **Create new line**
- **Delete current line**
- **show table data** this function displays all the current table's captured lines.

LookUp

The sub-menu function "LookUp" copies values from different sources into the current group or current field. The following functions are available:

- **Search in LookUp table:** the actual group or data record is mined according to the LookUp data source (parameters are set in OneClickSettings.ini). In this process a word in a field of the current group is clicked on (the search criteria) and subsequently the configured **LookUp**

table” is loaded. In the event a unique data record is found that meets the data mining criteria, the group fields are automatically filled and the cursor jumps to the next field.



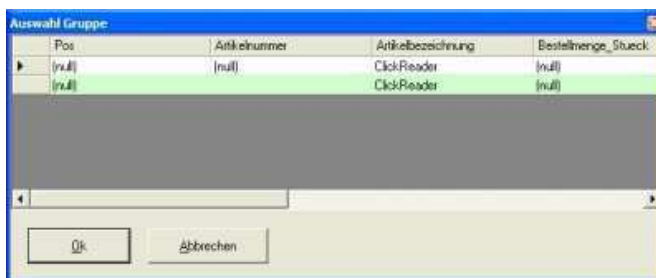
- In the event a data record is not found, the corresponding message is displayed on the screen.

If several data records are found, a window with the corresponding data record list is displayed; a data record can then be selected and transferred.

- **Search in data table:** this function starts the data mining process that mines data records that are located in all of the documents of the current batch, which contain the search terms in the same group.

The function “LookUp” mines all data fields that are located in the current batch, which contain the value “Click” in the field “Article Description”.

In the event the mined data record is not identified as a unique record the user must select the correct record manually from the table screen.



The user views all the captured data record values via the horizontal bar and transfers the decisive data records into the corresponding group by marking/blocking the data records and clicking the “OK” button.

- **Copy from previous document** this function copies the entire captured data record from the same group from the previous document into the current group of the current document.

Save document

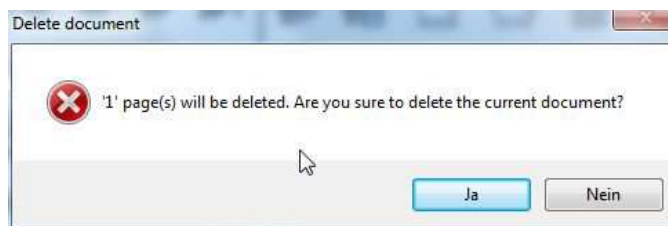
The **"Edit / Save Document"** function saves the current document. The captured data is transferred to the data record and can be utilized the next time the document is opened. The document remains in the current status.

Delete

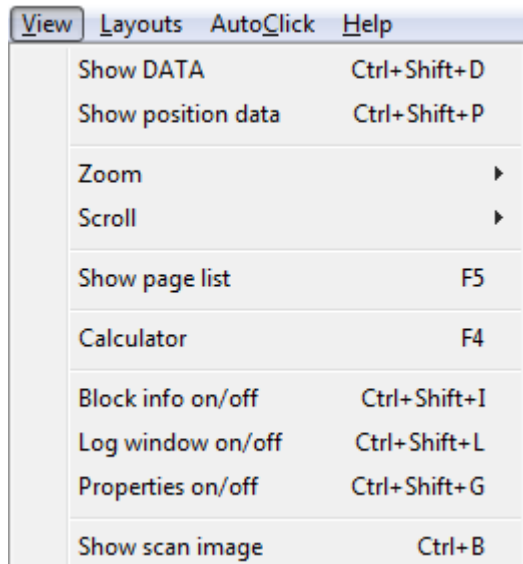
The sub-functions of the **"Delete"** menu reset processed/completed actions or deletes fields, pages, or documents. The following functions are available:

- **Delete current field:** the value in the current field (highlighted in yellow) is deleted. The field remains activated.

- **Reset current field:** the deleted value in the current field (highlighted in yellow) is reset. The field remains activated.
- **Undo last click:** reverses the last click.
- **Delete all fields in the current group:** all the values of a group are deleted. The field that was previously activated remains activated.
- **Reset document:** the document is reset to the status it had prior to the last time the record was saved. The changed and newly captured values are lost in this process.
- **Delete page:** the current batch page is deleted. The function should, for example, be performed on pages that are not needed in a specific document (for example empty pages).
- **Delete document:** the current document is deleted. The function should, for example, be performed on documents that are not needed in a specific document. The user must confirm the deletion of the document by clicking "Yes". If the current document is deleted then the previous document is loaded and can be captured and processed/edited.



5.8.3. View (AutoClick)



Show DATA

The “**View / Display Data**” function displays a table that contains all the fields that are to be captured, as well as the values, pages, and documents that have already been captured.

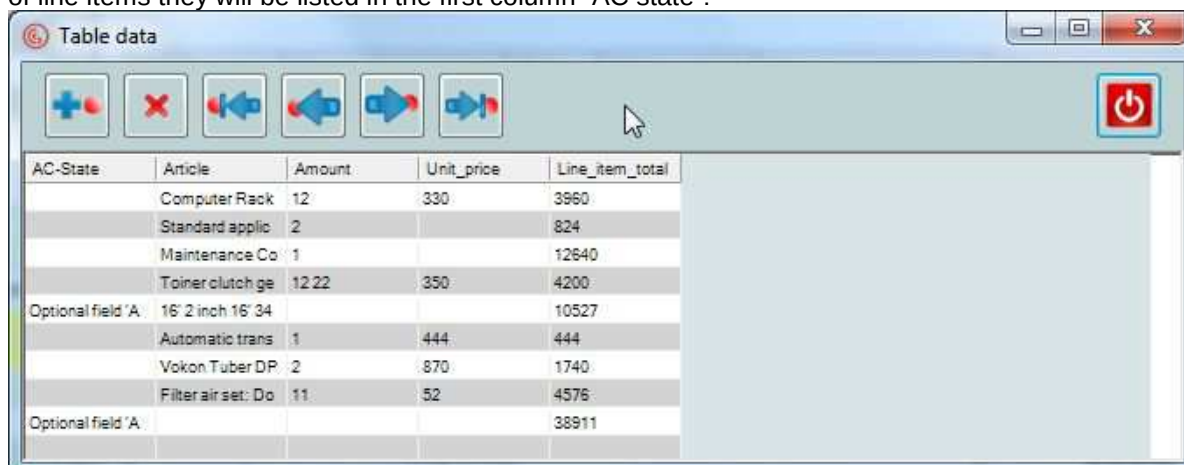


INP_ID	Stapelname	SUB_ID	Gruppe	CRStatus	CRBemerkun	CRcreated	CRfirstchang	CRlastchange	CRDocument	CRFulltextFil	CRBilddateiN	CRBilddateiPf	CRImage	CRPages	CRUsername	CRComp
1	mx_120423_0	1	doc_	1	(null)	23.04.2012	23.04.2012	23.04.2012	Alphaville 01.	Alphaville 01.	Alphaville 01.	C:\ProgramD	(null)	2	(null)	(null)
1	mx_120423_1	1	SUBGroup	0	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	0	(null)	(null)
1	mx_120423_2	2	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)
1	mx_120423_3	3	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)
1	mx_120423_4	4	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)
1	mx_120423_5	5	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)
1	mx_120423_6	6	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)
1	mx_120423_7	7	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)
1	mx_120423_8	8	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)
1	mx_120423_9	9	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)
1	mx_120423_10	10	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)
1	mx_120423_11	11	SUBGroup	1	(null)	23.04.2012	(null)	(null)	Alphaville 01.	(null)	Alphaville 01.	C:\ProgramD	(null)	(null)	(null)	(null)

The “Close” button navigates back.

Show position data

This function lists all captured line items i.e. table data in a window. If you have errors in the capturing of line items they will be listed in the first column “AC state”:



AC-State	Article	Amount	Unit_price	Line_item_total
	Computer Rack	12	330	3960
	Standard applic	2		824
	Maintenance Co	1		12640
	Toimer clutch ge	12.22	350	4200
Optional field 'A	16' 2 inch 16' 34			10527
	Automatic trans	1	444	444
	Vokon Tuber DP	2	870	1740
	Filter air set: Do	11	52	4576
Optional field 'A				38911

Zoom

The following additional functions are available:

- **Zoom to block:** this function zooms in the window that is displayed after the function has been activated with the mouse. By activating the function a second time the application returns to the original view.
- **Zoom 25%** displays the current page of the batch at 25% of the original size.
- **Zoom 50%** displays the current page of the batch at 50% of the original size.
- **Zoom 100%** displays the current page of the batch at 100% of the original size.
- **Zoom 200%** displays the current page of the batch at 200% of the original size.
- **Best fit** displays the current page in full.
- **Page width** adjusts the page width to fit the window width.
- **Page height** adjusts the page height to fit the window height.

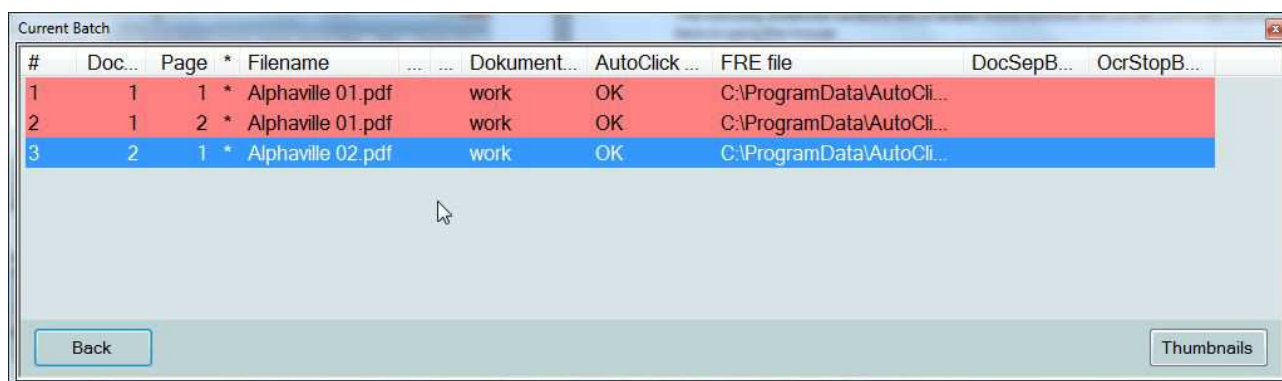
Scroll

The following additional functions are available; these functions are usually performed via the function keys or using the mouse:

- **Scroll Up:** shifts the page view up (Shift - Page Up)
- **Scroll Down** (Shift – Page Down)
- **Scroll left** (Shift – Home)
- **Scroll right** (Shift End)
- **Scroll to top** (Shift – Page Up)
- **Scroll to bottom** (Alt – Page Up)
- **Home** (Alt – Home)
- **End** (Alt – End)

Show page list

The “**View /Display Page List**” function displays all the pages of the current batch/stack in a separate window. By clicking on the desired page the respective document is displayed with the corresponding page.



Calculator

The “**View / Calculator**” function opens a type of calculator with which various calculations can be calculated, without obstructing the click rhythm.



By clicking the different values calculations can be performed; the corresponding results can be transferred to the corresponding field.

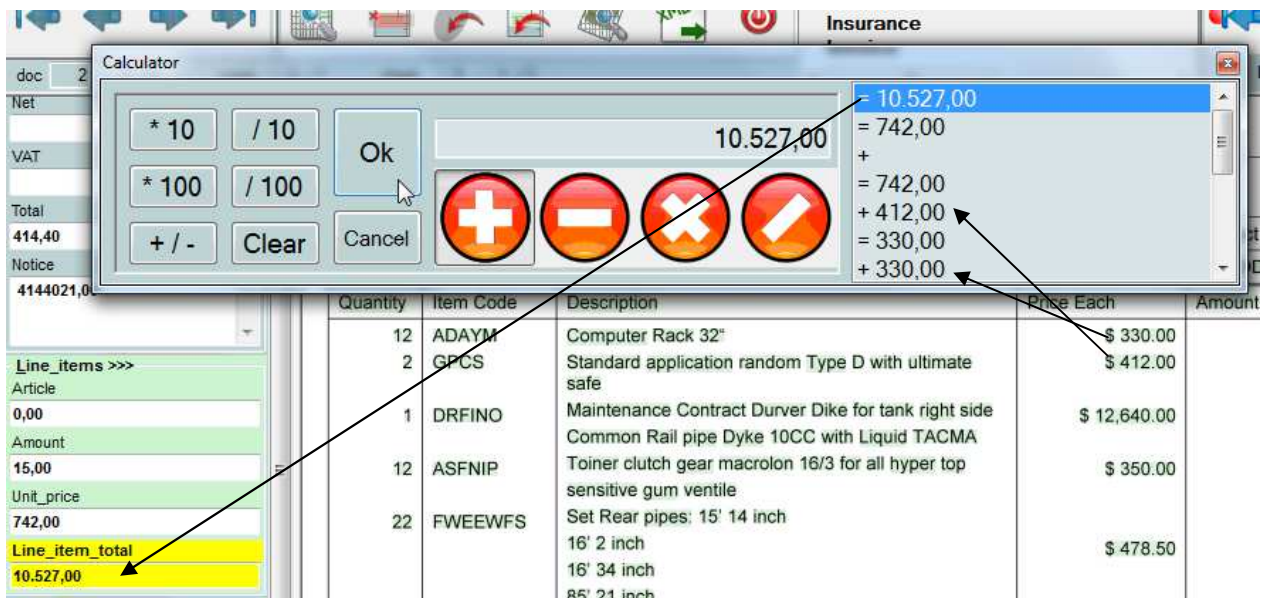
After the function has been performed the quick calculator remains on top and the user can perform different calculations for the active field.

The most important operators that are available are: addition, subtraction, multiplication, and division. In addition, values can be multiplied and divided with the factor of 10 and 100.



Upon opening the quick calculator the desired calculator operation can be selected by click.

Subsequently, all values are clicked that are to be calculated in the selected calculation.



By clicking "OK" the result is transferred into the active field. The quick calculator is closed and the user can continue with the capture of the next field in the layout.

The user can stop a calculation at any by clicking "cancel". The result is not transferred to the field.

Attention: Due to the fact that the quick calculator only processes numeric values it can only be opened if the cursor is in an active numerical field.

Block Info on/off

The "View / Block Info on/off" function displays information pertaining to the individual text blocks that have been recognized in the current page. This is a service and debug function.

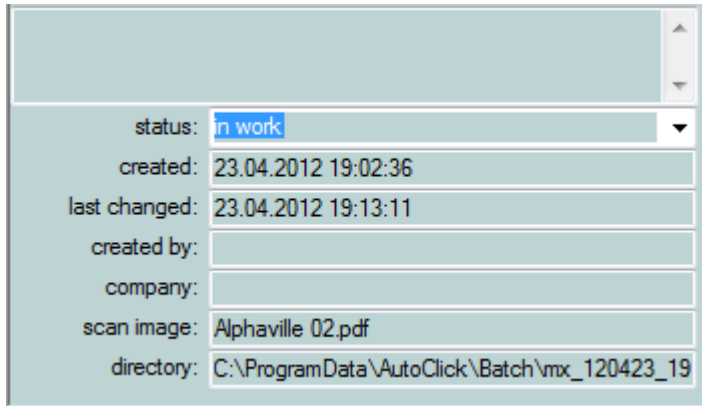
Log window on / off

The "View / Log window on / off" function displays different application information. Each layout switch is documented in the log window. The current batch name, for example, is recorded there.

Properties on / off

The “**View / Properties on / off**” function displays different information of the current document.

The properties window is located in the lower left hand corner of the AutoClick screen.



The following information is displayed in the properties window:

Document Status

- Creation date
- Date of the last change
- User name of the creator
- Company
- Scan file (name of the image file)
- Target directory of the scan file

Show scan image

The “**View / Show scan Image**” opens the current page (image file) with a third party graphics program.

Important: Changes to the original image file do not affect the pages of the current document.

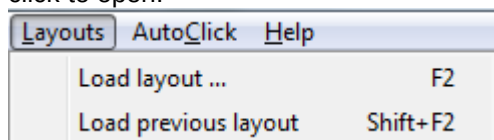
Should the image file be supplemented with additional information the processing of the image file with the AutoClick application must be repeated.

. The page recognition function must also be repeated to ensure that all of the existing texts in the image file are recognized.

5.8.4. Layouts (AutoClick)

Load layout...

The “**Layouts / Load Layout...**” function activates the window area highlighted in yellow in which all layouts are listed. The up / down keys and the enter key on the keyboard allows the user to navigate between the listed layouts, a further option is: to place the cursor on the desired layout and double click to open.



Load previous layout

The “**Load previous Layout**” function switches to the layout that was previously active.

5.8.5. AutoClick (AutoClick)

AutoClick	Help
Training	Ctrl+T
Read current page	Ctrl+R
Alle unvollständigen Seiten lesen	Ctrl+U
Read all pages	Ctrl+Shift+R
Show results	Ctrl+Shift+T

Training

The “**Training / AutoClick**” function switches into the training mode where you can train suppliers, document types and layout fields to capture data automatically. The training has to be done in the sequence just mentioned. You cannot train a layout field without having trained the supplier and the document type of this supplier.

You don't have to train all layout fields. You can train as many fields as you like. If you want to delete a supplier just open the training window and delete the supplier from the list.

To finish the training press the  button. The training window will close.

Read current page

The “**Read current page / AutoClick**” function reads the current page and tries to find the data for the trained layout fields. The result will be given in the AutoClick Results Table. If the page in the table is marked green, all the trained fields were captured. If the page line in the table is yellow not alle the fields were captured. If the page line in the table is red the page couldn't be matched to the trained suppliers or trained document types.

Now you can capture the empty fields by clicking on the target information on the document or you can switch into the training mode modify the training of the supplier, document type or layout field.

Read all pages

The “**Read all pages / AutoClick**” function works the same way as the “read current page” function. The difference is that the whole batch is read.

Show results

The “**Show results / AutoClick**” function shows the result of the last AutoClick Read. The result is shown in a table in a separate window; each page of the batch is shown in one line. The lines are marked

- red, if the current page couldn't be matched to one of the trained suppliers or document types
- yellow, if not all trained layout fields were successfully read
- green, if all trained layout field were successfully read.

In addition you get a short status comment in every line.

To find a page that is listed in the table just click on the page in the table. The table will close and the selected page is shown in the main window of AutoClick.

5.8.6. Help (AutoClick)

Online Help

The "**Help / Online Help**" function opens the online application's help system.

About

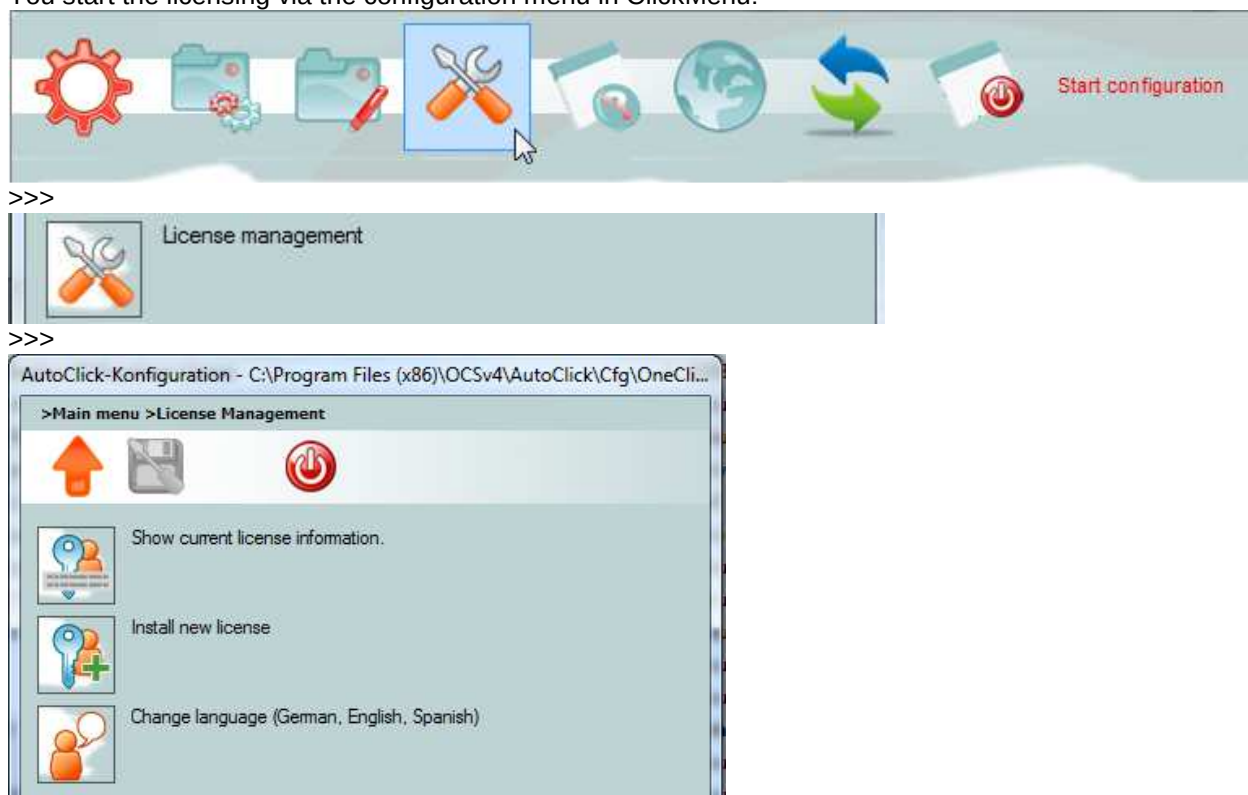
The "**Help / About**" function displays the version numbers for the ClickScanner application and the FineReader Engine.

Important:

All batch processing settings are set in the OneClickSettings.ini file.
(Default: C:\ProgramData\AutoClick\OneClickSettings.ini).

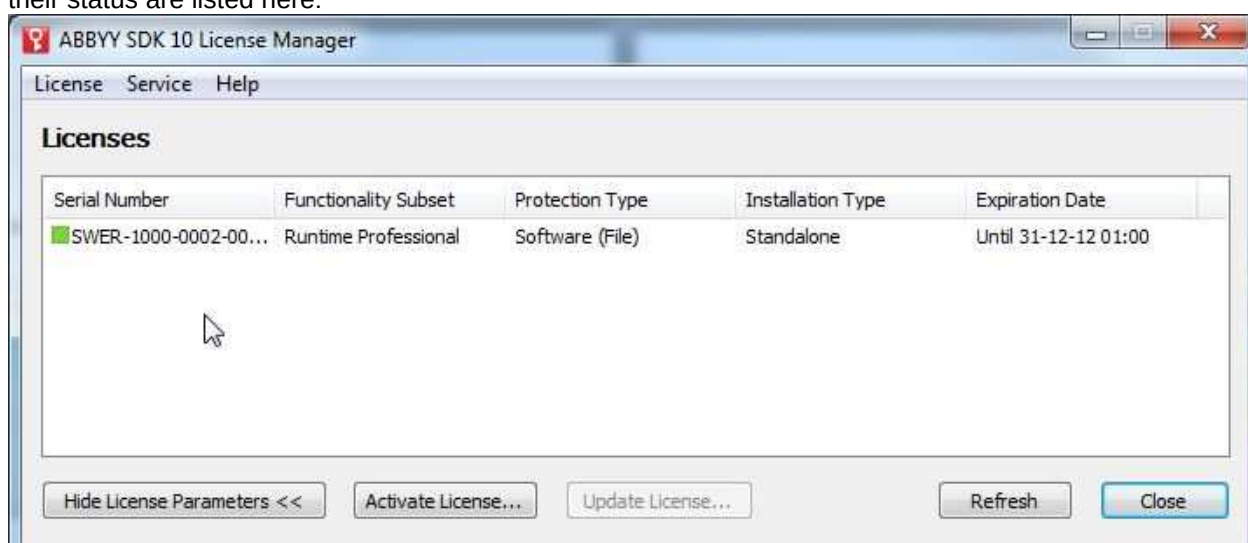
6. Installation, license, language

The installation and licensing of AutoClick is written in the document "Installation AutoClick v4". You start the licensing via the configuration menu in ClickMenu:

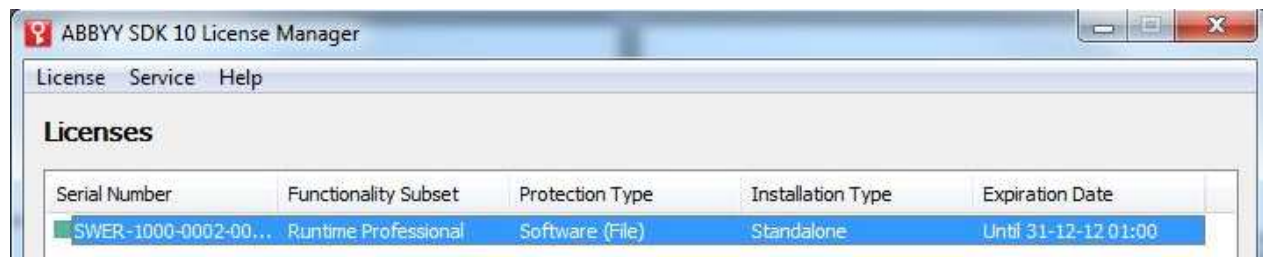


1.1. Show current license information

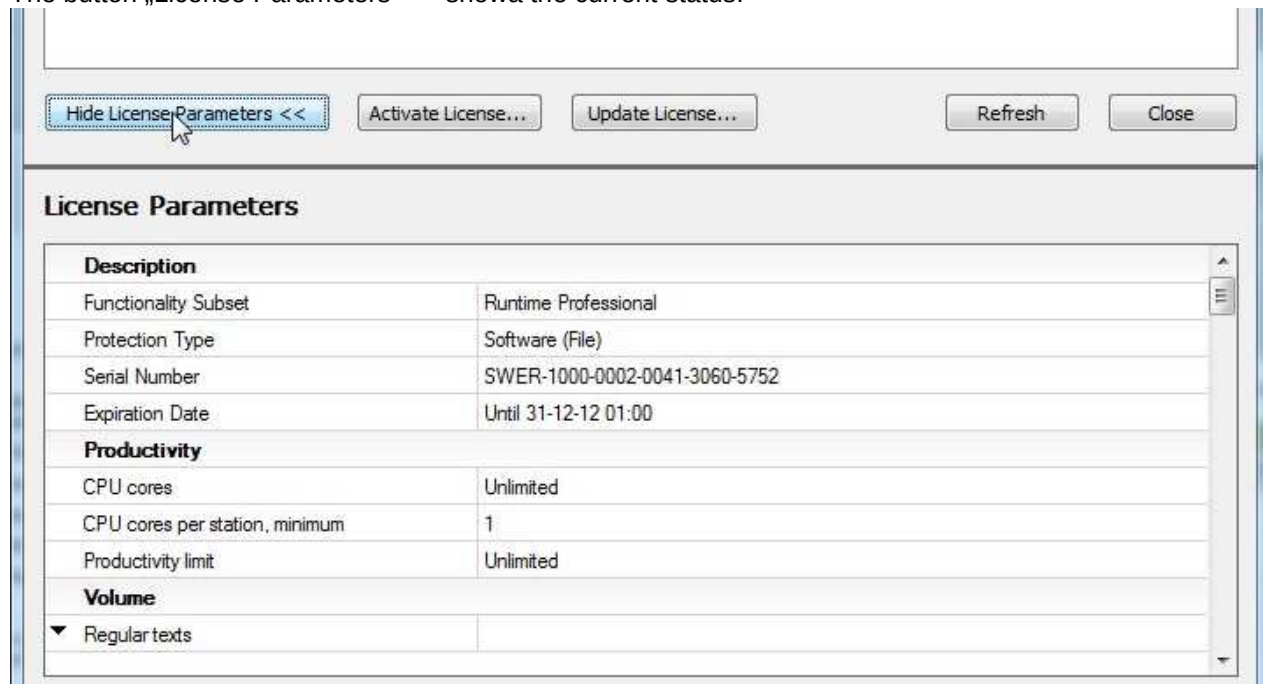
The button „Show current license information“ opens the license administration. All current license with their status are listed here:



To see a detailed status of a license you just click a license.



The button „License Parameters >>“ shows the current status:



The button „Hide License Parameters <<“ closes the window.

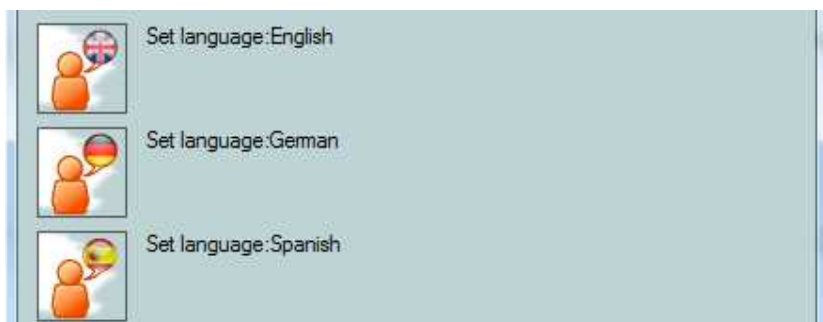
Having selected a license you can also activate or update the license (for instance if you have purchased an Add-on later).

The „Refresh“ button refreshes the status then.

1.1. Install new license

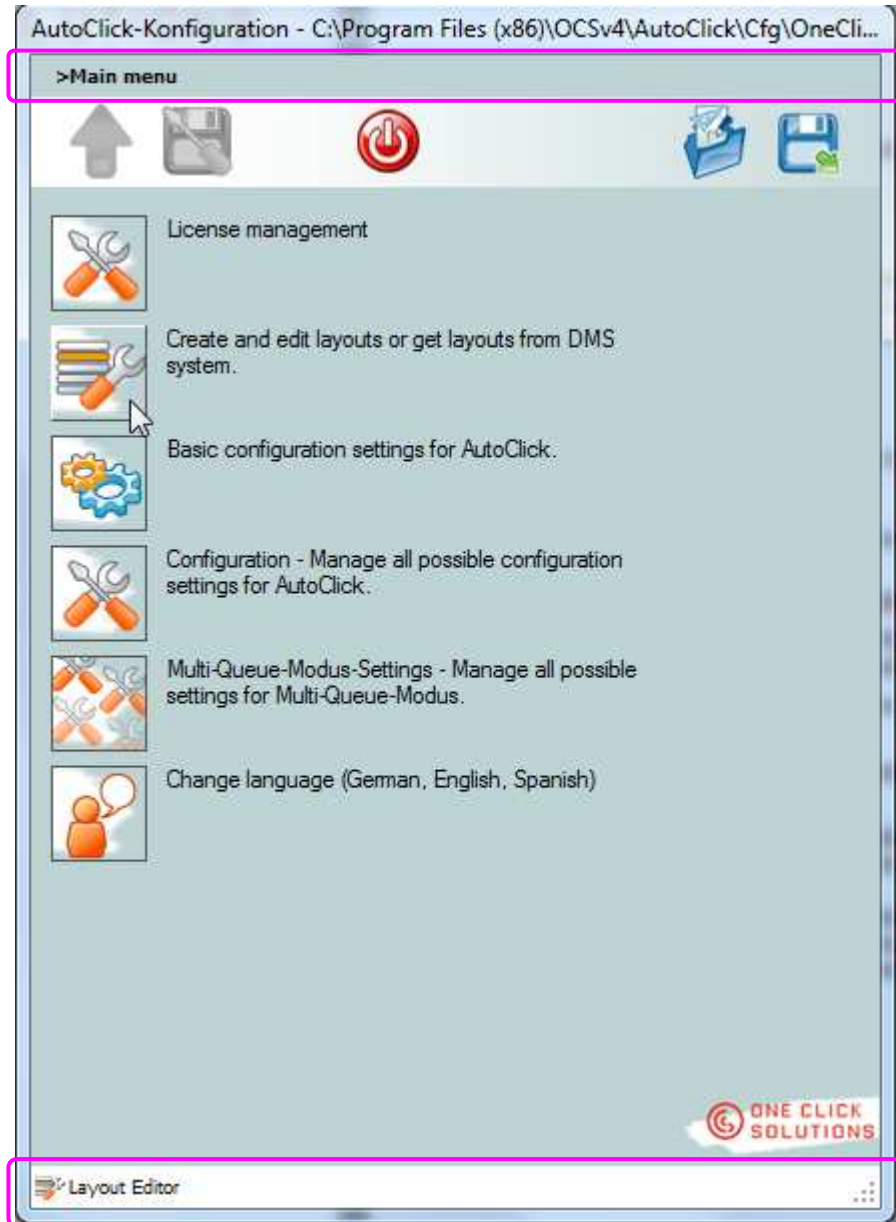
Please read the document „Installation AutoClick v4“.

1.1. Change language



7. Configuration (OneClickSettings.ini)

In the section “Configuration” all settings and parameters for AutoClick are made.



It contains:

- License administration
- Layout creation (for capturing)
- Basic settings (navigated wizard)
- Complete settings

To give you a general view at which position in the configuration you are, you find the path at the top of the window.

When you touch a button with the mouse a status line will be opened at the bottom of the window to explain what the function of the button is.

There are the following menus:

-  Licence management
-  Create and edit layouts from DMS system
-  basic configuration settings for AutoClick
-  configuration – Manage all possible configuration settings for AutoClick
-  MultiQueue-Mode settings – Manage all possible settings for the MultiQueue-Mode
-  Change language (German, English, Spanish)

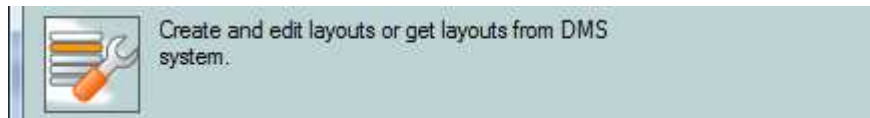
The navigation is done by the following buttons:

button	explanation / action	statusline
	Exit of the section "configuration". All settings made which have not been saved will be lost.	 Konfiguration beenden
	All settings made will be saved and are available immediately.	 Konfiguration übernehmen
	(just in main menu „configuration“: the button leads one level back.	 Zurück
	This button is only available when you have set „multiple scan directories“. The button selects the configuration file to be configured.	 Konfigurationsdatei öffnen
	This button is only available when you have set „multiple scan directories“. The button offers to save the actual configuration under a new name.	 Konfigurationsdatei speichern unter...

7.1. Licence administration

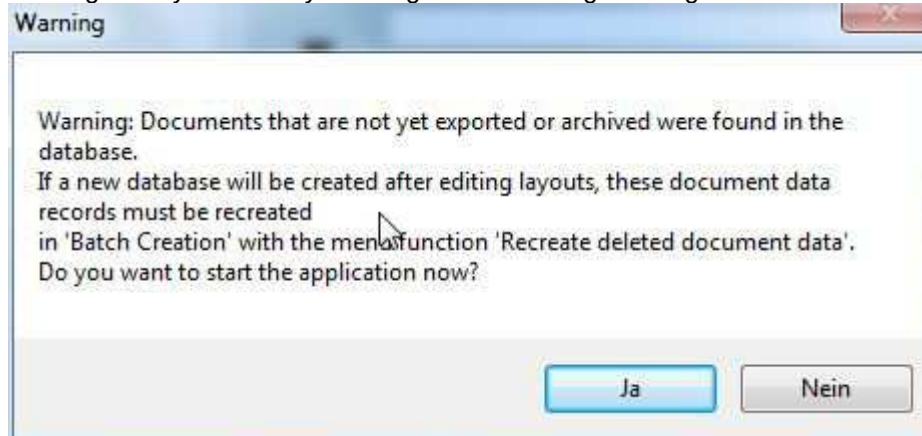
Please read chapter „Installation, license, language“.

7.2. Layout-Editor



The layout-editor is the tool to create, build or define the layouts, i.e. the capture screens, which will be used by AutoClick. There can be defined as many different layouts as needed such as for invoice, delivery notes, correspondence, service requests, insurance declaration.

Starting the layout editor you first get the following message:



Notice: if you delete anything in a layout (i.e. a complete layout, a group or a field) and create the a new data base a part of already captured information will be lost! This cannot be undone!

Talking about layouts we distinguish between 3 containers:

- **Layouts**; capturing screen for a certain document type (e.g. invoice)
- **Groups**; a group includes a specified number of capturing fields with common properties
- **Fields**; these are input- or capturing fields which have to be specified individually such as invoice date or invoice number

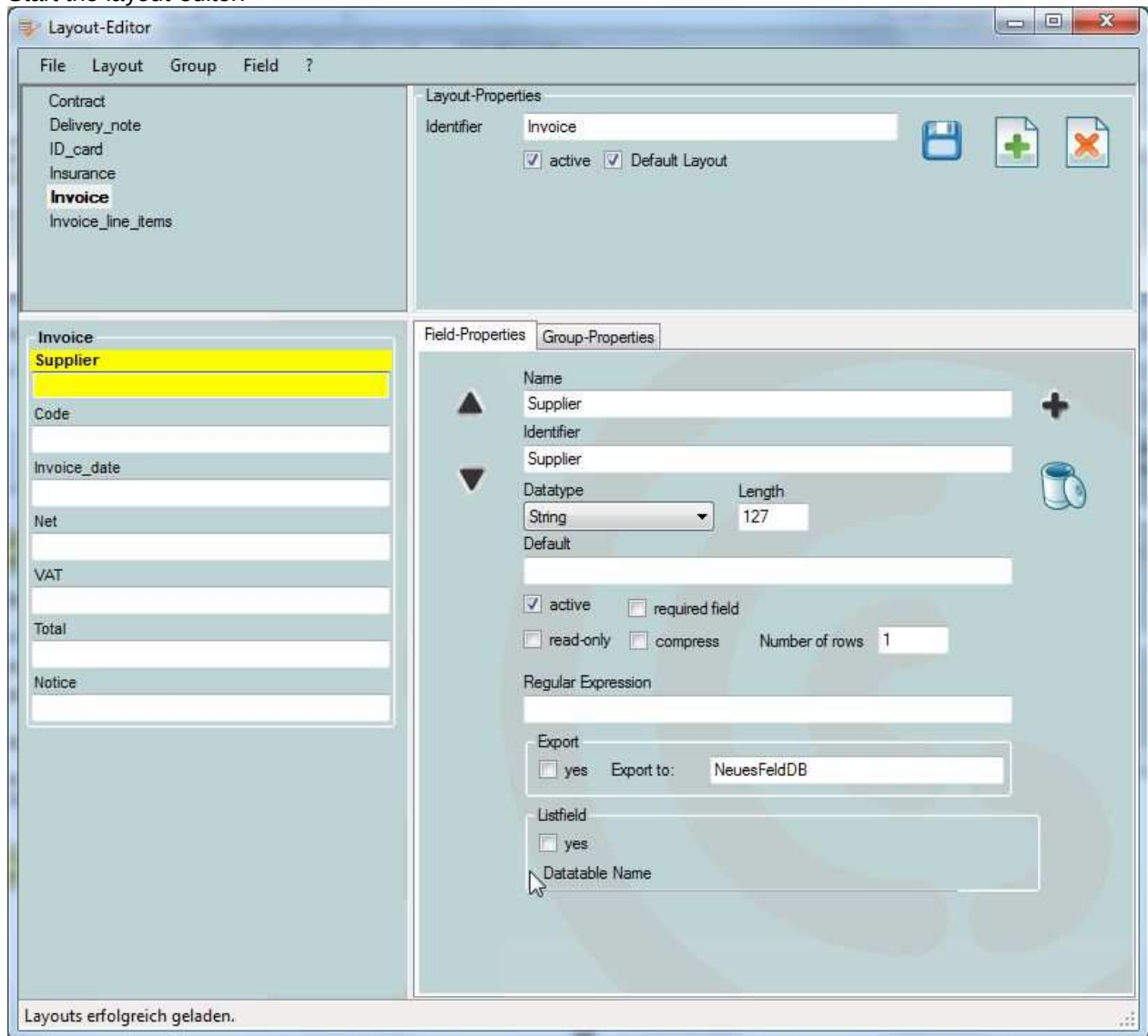
Each layout consists at least of one group with at least one field

Layouts are built as follows: create a new layout and name it. Then define at least one group and specify it. Then define the fields in each group. Then you can add additional layouts, groups and fields as you need.

Notice: to activate a layout you have to save the layout in the layout database (menu: "File \ Create database"). Then you can use the layout in AutoClick to capture documents.

7.2.1. How to create a new layout

Start the layout-editor:



The layout editor will show up with the layout that stands first in the list of existing layouts (alphanumeric sequence).

When you create a new layout the default will automatically switch to the new layout.

The screen window is structured as follows:

Task bar	
List of all defined layouts	Properties of the actual layouts
Fields and groups of the actual layout	Properties of fields and groups of the actual layouts
Status line	

Starting the layout-editor you'll find the default layouts "Invoice" and "Delivery note". They are already in the layout Database saved and can be immediately used by AutoClick.

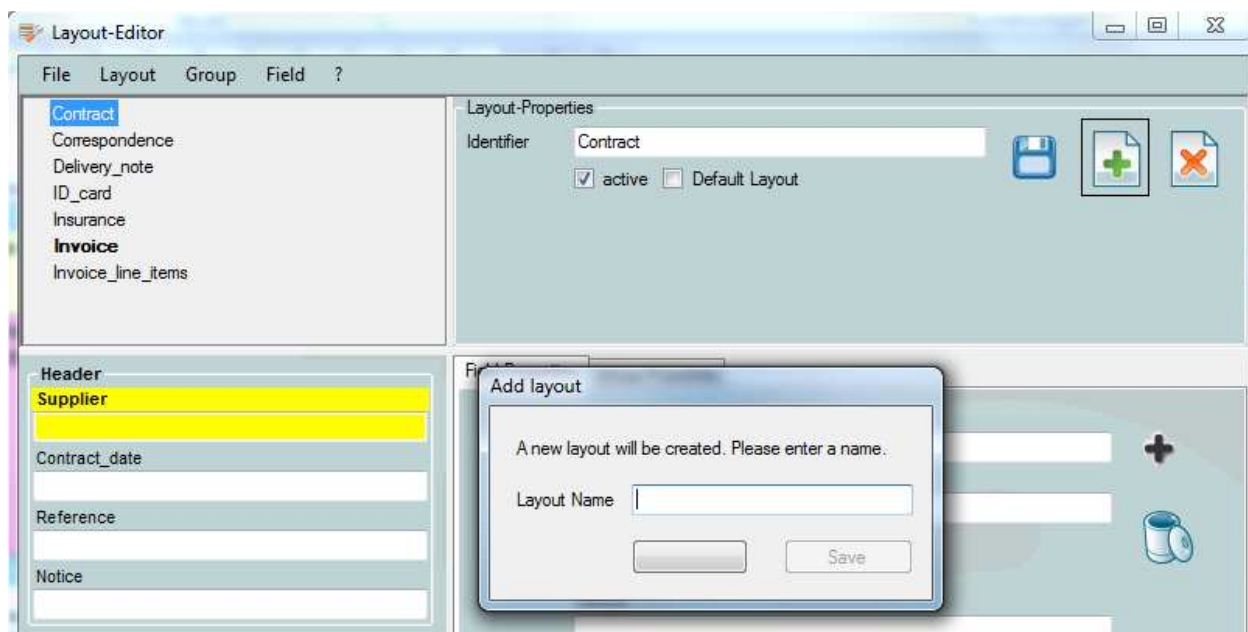
To create a new layout you have different possibilities:

- Start with a new and empty layout via the button  or the menu: "Layout / Add Layout"
- Start with a layout template and modify it later (via the menu: "Layout / Add Layout (Template)")
- Copy an existing layout and modify it afterwards (via the menu: "Layout / Copy Layout")

Create a new and empty layout:



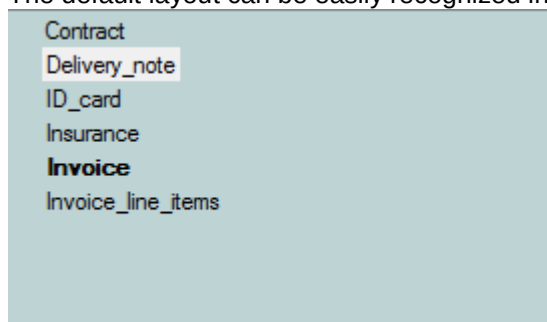
To create a new layout press the button  in the section "Properties of the current layout" (top right) or start via the menu "Layout / Add Layout". The complete screen window will be refreshed and a sub window is shown where you have to type the name of the new layout:



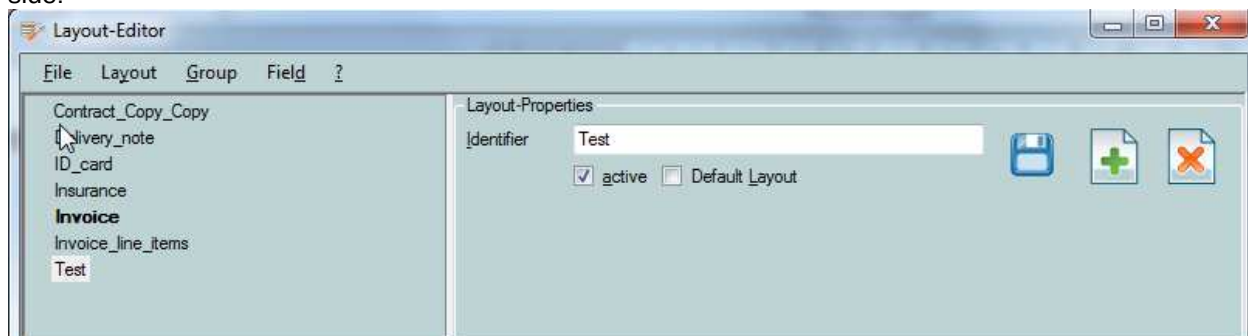
The checkbox “active” sets whether this layout will occur in the AutoClick window screen or not. By this you can decide which of your layouts you currently want to use without deleting them in the layout-editor or the layout-Database.

The Checkbox “Default Layout” sets whether this layout will be the coming up layout in AutoClick, i.e. whether this will be the layout which you will first see in the AutoClick window screen. This setting will always change to the layout which has been ticked as default layout at last.

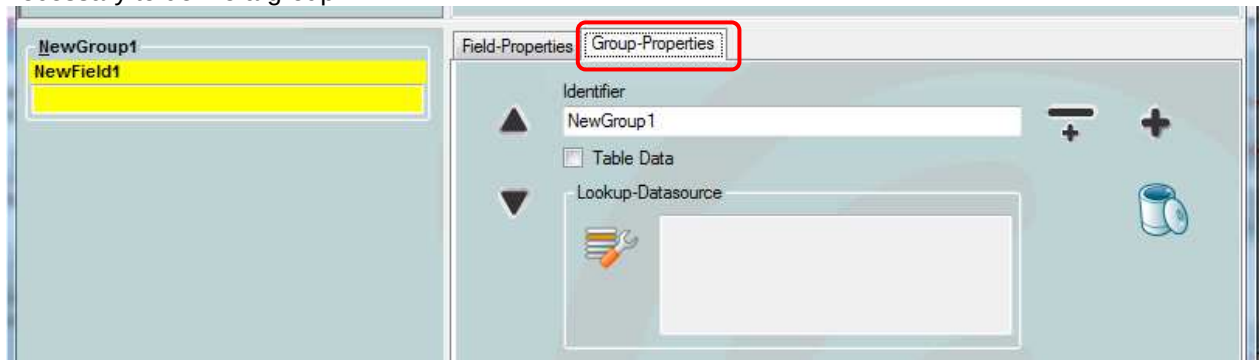
The default layout can be easily recognized in the list of layouts. It is written in bold:



If you want to save your selections and properties of the new layout just press the button  (or choose the menu: “File / Save”). Then you see the name of your new layout in the layout list on the left side:



In the next step the group properties have to be defined. Especially for line items (table data) it is necessary to define a group.

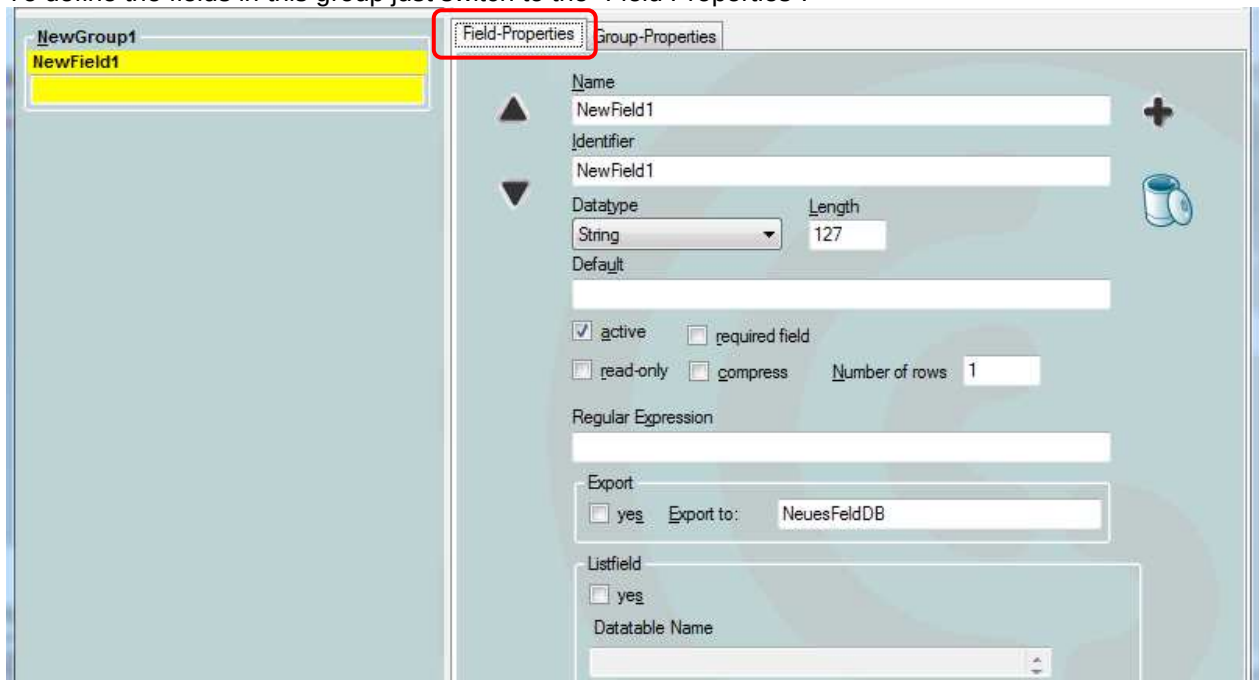


Type the group name in the identifier field (default: NewGroup1) and decide at the checkbox „Table Data“ whether this group shall be used for capturing position lines in table data (e.g. in invoices). During capturing with AutoClick you can dynamically open this group as often as you need it.

Through the “LookUp Datasource” you define from which Database you like to include LookUp Data (via CSV, XML or SQL).

The 5 bigger buttons allow you to position/move this group inside your layout. At this moment they have no relevance because there is only one Group existing.

To define the fields in this group just switch to the “Field Properties”.



The meanings of the properties are:

Name ((Default: NewField1)	Field name for the Database (has to be ONE word, if necessary use underscores as blanks. The name "Date" is not allowed here, if necessary use a double word and underscore as blank).
Identifier (Default:NewField1)	Field identifier as shown in AutoClick window screen.
Datatype (String)	String, Reference, Date, Float, Boolean, Integer
Length (127)	Max. number of characters that can be captured in this field.
Default (empty)	Default input for this field
Number of rows (2)	Specifies the number of rows for this field in the AutoClick window screen.

The Checkboxes define:

Active	Whether this field shall be shown in the AutoClick window screen.
Required field	Whether this field is a mandatory field
Read only	Whether this field can be filled by the user or only automatically by a LookUp-Database.
compress	Whether all spaces at the beginning and at the end of the captured sequence shall be automatically eliminated.

The input field "regular Expression" specifies any regular expression to put more control on the input and enhance the quality of capturing.

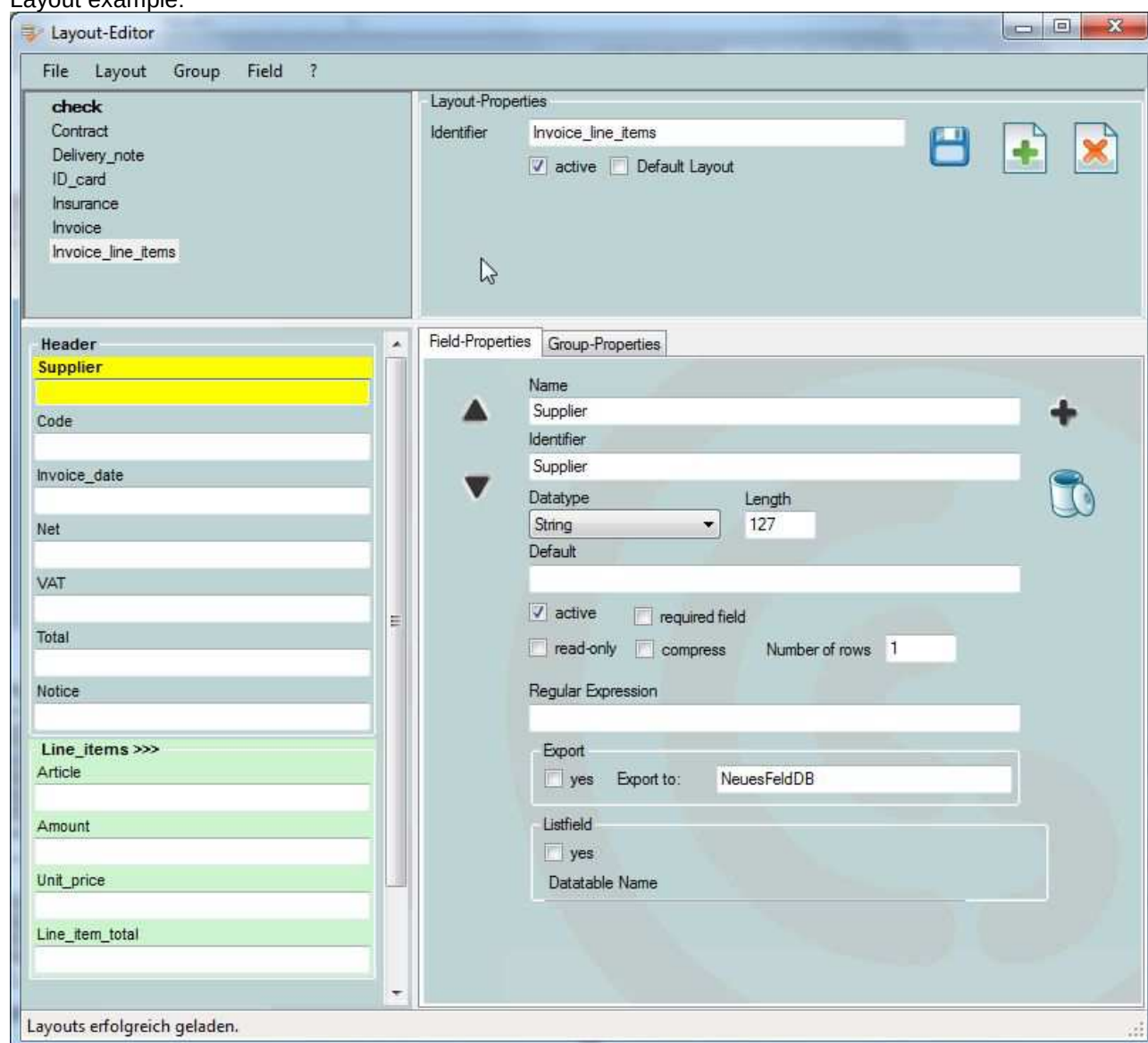
In the "export" frame you define whether the captured value/information in this field shall be copied to another field in the database.

The frame "Listfield" defines whether this field shall be filled via a LookUp-Database.

Now you have already defined the shortest layout that is possible; it contains one group with one field.

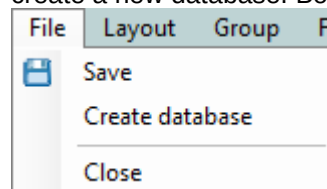
Now you can add more field and groups. Via the buttons   you move this field up- or downwards, via  you erase this field and with  you add a new field.

Layout example:



In the example a new group "Position" has been defined as Table Date, so that you can later during the capturing phase dynamically open this group again and again (those kind of groups always have green colour background).

To process a layout in AutoClick you have to do two more steps: save the layout definitions and then create a new database. Both functions you find in the menu:



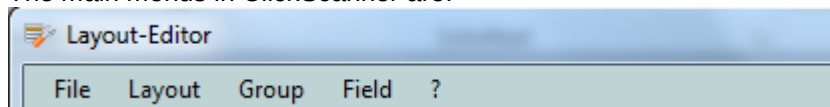
Having done so you can process new documents and batches with the new layouts.

7.2.2. Functions

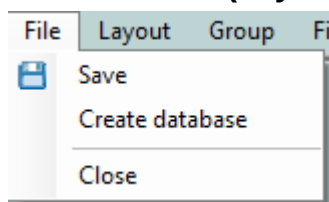
Layout-Editor is comprised of the following functions (fields highlighted with a green background can be selected using buttons)

Level 1	Level 2	Level 3
File	Save	
	Create database	
	Close	
Layout	Current layout as 'default'	
	Refresh	
	Add Layout	
	Add Layout (Template)	
	Copy Layout	
	Delete Layout	
Group	Add Group	Split Current Group
		Add New Group
	Move Group	Move Up
		Move Down
	Delete Group	
Field	Add Field	
	Move Field	Move Up
		Move Down
	Delete Field	
?	Help	
	Info	

The main menus in ClickScanner are:



7.2.3. File (Layout-Editor)



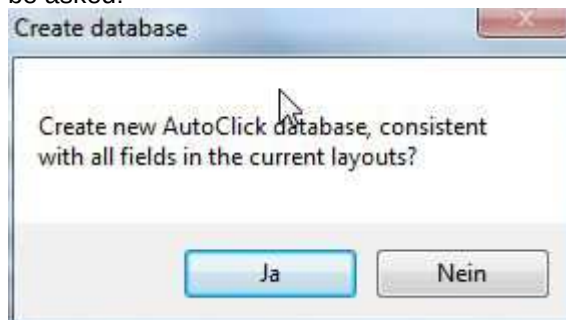
Save

The **“File / Save”** function saves the current layout. The function does not create any fields or definitions in the Database. The view will be automatically refreshed.

Attention: The function “Save” just saves the properties. It does not create fields in the database what is necessary for capturing with AutoClick. To create or refresh the necessary database use the “File / Create DB” function.

Create database

The **„File / Create database“** function closes the application Layout-Editor. All properties and definitions are saved in the database and can be used in the capturing process. Before action you will be asked:

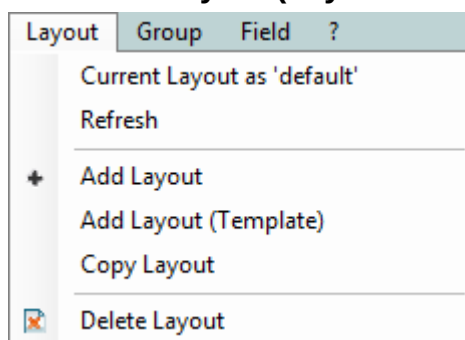


Close

The **“File / Close”** function closes the application Layout-Editor. All new definitions and properties will be lost and cannot be used in the capturing process. Leaving the application there is last interrogation whether you want to save the changes or not:



7.2.4. Layout (Layout-Editor)



Current layout as 'default'

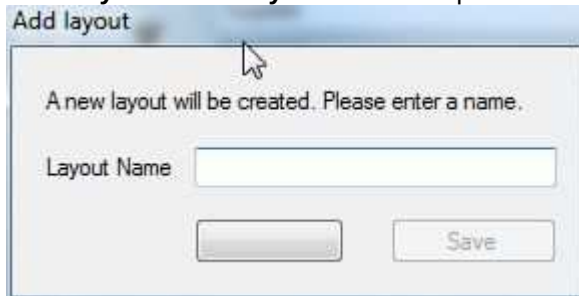
The "**Layout / Current layout as 'default'**" function changes the tick in the checkbox 'default layout' to the current open layout.

Refresh

The "**Layout / Layout Refresh**" function refreshes the view of Layout-Editor. It makes no savings and does not create any fields in the database.

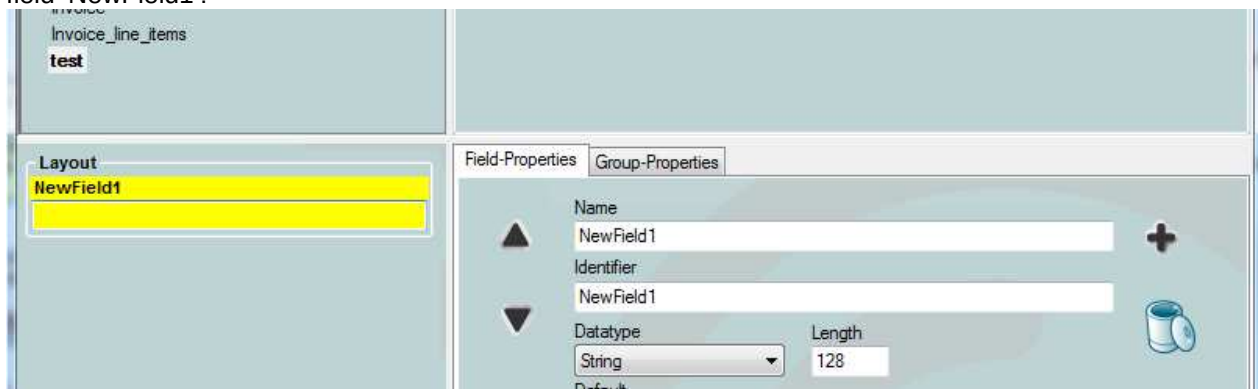
Add Layout

The "**Layout / Add Layout**" function opens a sub window:



Here you type the name of the new layout and confirm or abort.

Having confirmed the layout editor creates a new layout with one default group 'layout' and one default field 'NewField1':



Add Layout (Template)

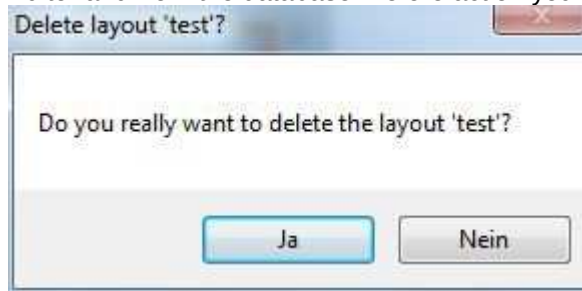
The "**Layout / Add Layout (Template)**" function creates a new layout called "Vorlage" according to a sample which can be modeled by the user. The device of the sample is: "C:\Programme(x86)\One Click Solutions\AutoClick\LEd\Templates\Template.cly".

Copy Layout

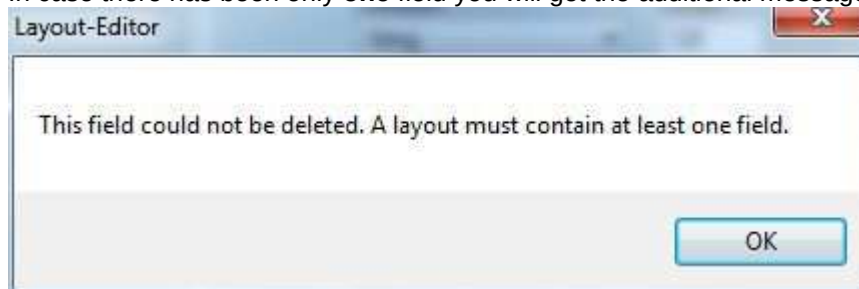
The "**Layout / Copy Layout**" function copies the current layout and calls it "xyz_Kopie". It has the same properties as the original. It can be modified as any other layout..

Delete Layout

The “**Layout / Delete Layout**” function deletes the current layout from the list of layouts in the Layout-Editor and from the database. Before action you will be asked:

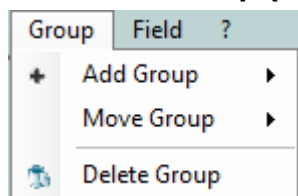


In case there has been only **one** field you will get the additional message:



Attention: this function deletes the current layout and all its properties. The layout cannot be called back and the layout is not any longer available in the capturing process.

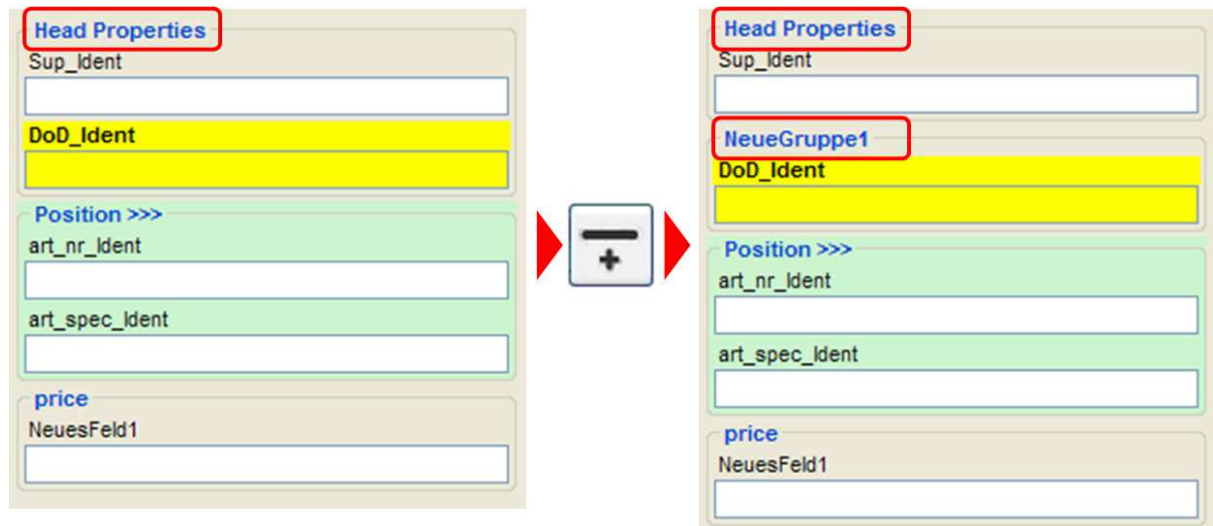
7.2.5. Group (Layout-Editor)



Add Group / Split Current Group

The “**Add Group / Split Current Group**” function splits the current group above the current field. The new Group is named with a default name (“NeueGruppe1” or “NeueGruppe2” ...). The new group has the same properties as the origin one and it can be modified as any other group.

Important: If two groups shall be put together, the fields of one group have to be moved (up or down) into the other group. Moving the last field the “empty” group will be deleted automatically.



Add Group / Add New Group

The „Add Group / Add New Group“ function creates a new group which will be placed below the current field. Using the buttons   the group can be placed anywhere else in the layout.

Move Group

This function moves a group to any position in a layout. The following Move functions exist:

- Move up
- Move down

Delete group

The „Group / Delete Group“ function deletes the current group (one of the fields in this group is highlighted yellow). There is a safety interrogation before execution.

Attention: this function deletes the current group and all its properties. The group cannot be called back and the group is not any longer available in the capturing process.

7.2.6. Field (Layout-Editor)

Add Field

The „Field / Add Field“ function creates a new field which will be placed below the current field. Using the buttons   the new field can be placed anywhere else in the layout.

Move Field

This function moves a field to any position in a layout. The following Move functions exist:

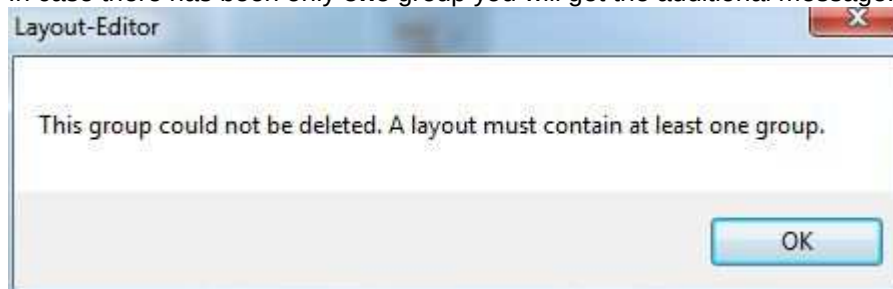
- Move up
- Move down

Delete Field

The “**Field / Delete Field**” function deletes the current field (the field is highlighted yellow). Before action you will be asked:



In case there has been only **one** group you will get the additional message:



Attention: this function deletes the current field and all its properties. The field cannot be called back and the field is not any longer available in the capturing process.

7.2.7. ? (Layout-Editor)

Help

The “**? / Help**” function opens the application's help system.

Info

The “**? / Info**” function displays the version numbers for the Layout-Editor.

7.2.8. Buttons (Layout-Editor)

In this chapter all available buttons of the Layout-Editor application will be described. There are buttons to modify

- the Layout properties
- the Field properties
- the Group properties

Buttons Layout properties

**Save**

The button saves the current layout without modifying/refreshing the database.

Function "File / Save"

**Add layout**

The button adds a new layout.

Function "Layout / Add Layout"

**Delete Layout**

The button deletes the current layout. Before execution there is a safety interrogation.

Attention: this function deletes the current layout and all its properties. The layout cannot be called back and the layout is not any longer available in the capturing process.

Buttons Field properties
**Add Field**

The „**Field / Add Field**“ function creates a new field which will be placed below the current field.

Function "Field / Add Field"

**Delete Field**

The button deletes the current field. Before execution there is **no** safety interrogation.

Attention: this function deletes the current field and all its properties. The field cannot be called back and the field is not any longer available in the capturing process.

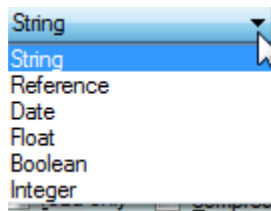
**Move up**

The button moves the current field one position up.

Function "Field / Move Up"

**Move down**

The button moves the current field one position down.



Listbox Datatype

Here you can choose the datatype for the current field (e.g. 'amount' >> Float, 'Notice' >> String).

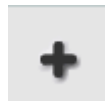
Buttons Group properties



Split Current Group

The button splits the current group above the current field. The new group has the same properties as the origin one and it can be modified as any other group.

Function "Group / Add Group / Split Current Group"



Add New Group

The button creates a new group which will be placed below the current field.

Function "Group / Add Group / Add new Group"



Delete Group

The button deletes the current Group from the list of Groups in the Layout-Editor and from the database. Before execution there is a safety interrogation.

Function "Group / Delete Group"

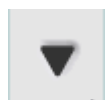
Attention: this function deletes the current group and all its properties. The group cannot be called back and the group is not any longer available in the capturing process.



Move Group / Move Up

The button moves a field one position up.

Function "Group / Move Group / Move up"

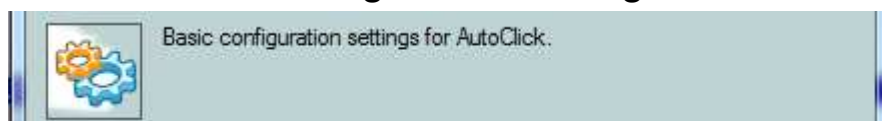


Move Group / Move Down

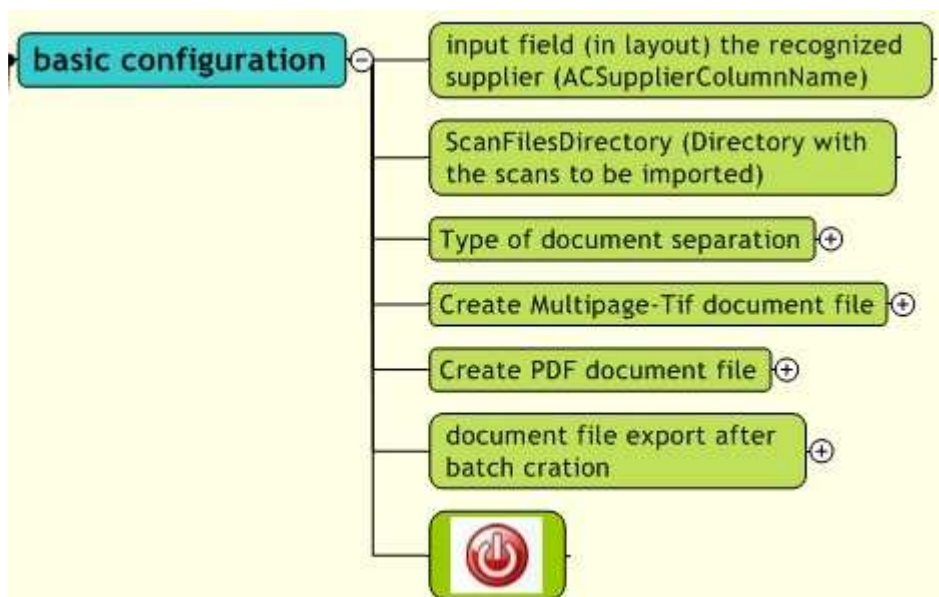
The button moves a field one position down.

Function "Group / Move Group / Move Down"

7.3. Basic configuration settings for AutoClick



You will be navigated through the following settings (there is no exit possibility in between):



You navigate the menu via the following buttons:

button	explanation / action	statusline
	Exit of the section "configuration". All settings made which have not been saved will be lost.	 Konfiguration beenden
	All settings made will be saved and are available immediately.	 Konfiguration übernehmen
	Button returns to previous setting.	 Zurück
	Button navigates to the next setting.	 Zur nächsten Konfigurations-Einstellung
	Button confirms a single or multiple choice or indicates the end of a settings path.	 Konfiguration übernehmen
	Button quits the actual settings and returns to the main menu where you have to decide whether you want to save the settings made or exit the configuration without saving.	 Aktuelle Konfiguration abbrechen
	Just in main menu „configuration“: the button leads one level back.	 Zurück

7.3.1. Factory settings

AutoClick will be delivered with the following factory settings:

Notice: the factory settings restored by deleting the configuration file „OneClickSettings.ini“ in the sub installation directory („C:\One Click Solutions\AutoClick\Cfg\OneClickSettings.ini“). By next opening of the batch creation function a new “OneClickSettings.ini” with the factory settings will be generated.

Default Scan-directory for automatic batch creation (Directory where the image files are imported from): „C:\Programme\One Click Solutions\AutoClick\CFG\Auto\Scans“.

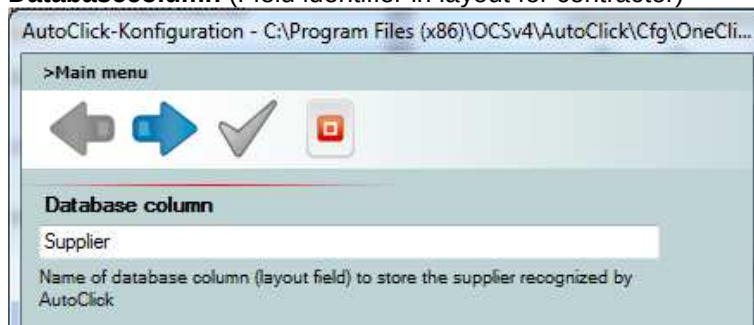
Default created batch directory for automatic batch creation (Directory where the created batches are exported to) „C:\Programme\One Click Solutions\AutoClick\CFG\Auto\Batch“.

Default export directory for automatic batch creation (Directory where the export files are exported to): „C:\Programme\One Click Solutions\AutoClick\CFG\Export“.

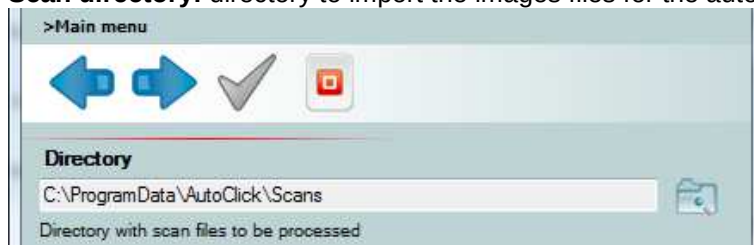
Default Scan directory for manual batch creation (Directory where the image files are imported from): „C:\Programme\One Click Solutions\AutoClick\CFG\Manu“.

Default Scan examples Beispiele for manual or automatic batch creation (Directory for image files examples): „C:\Programme\One Click Solutions\AutoClick\CFG\Scans“.

Databasecolumn (Field identifier in layout for contractor)



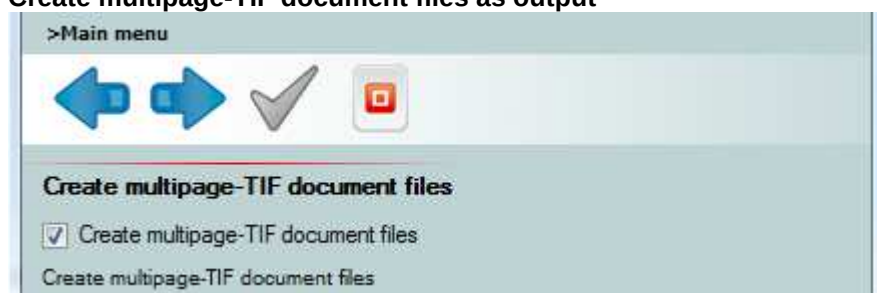
Scan directory: directory to import the images files for the automatic batch creation



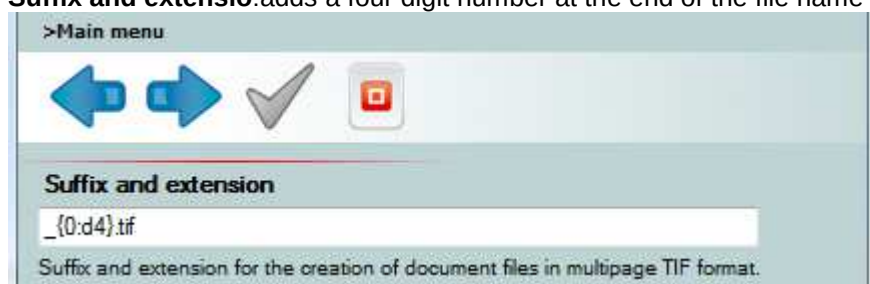
Document separation: separator sheet (plane sheet between documents)



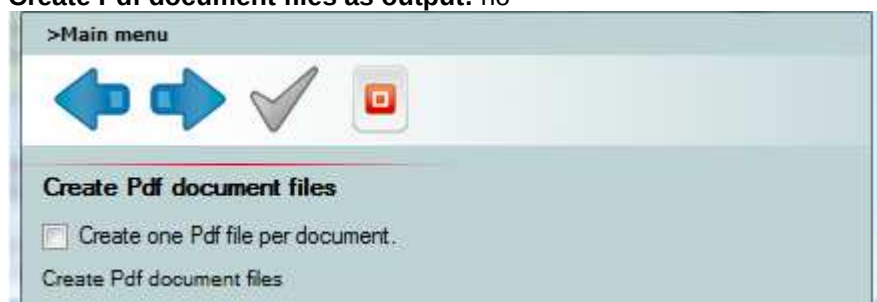
Create multipage-TIF document files as output



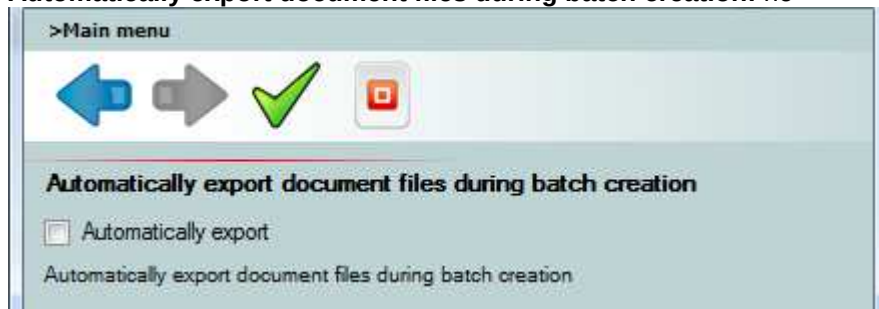
Suffix and extension: adds a four digit number at the end of the file name



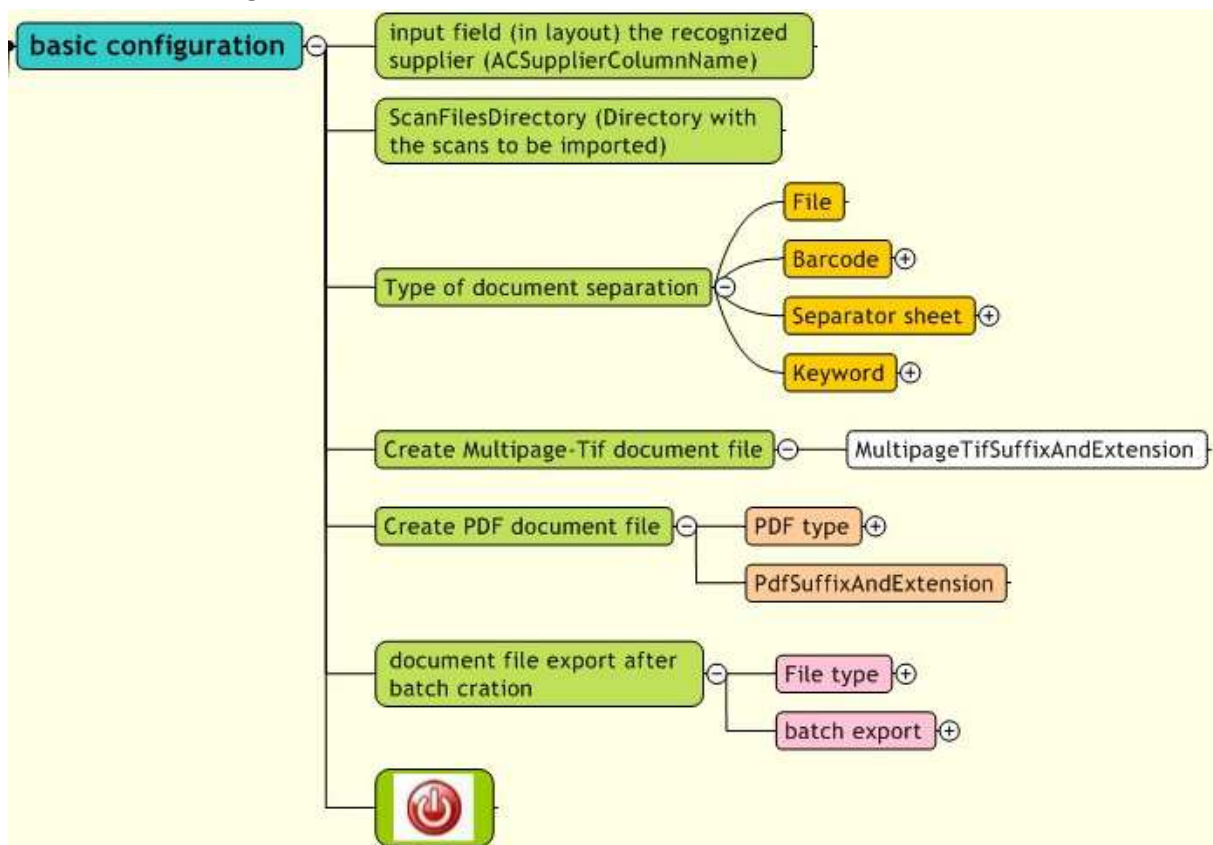
Create Pdf document files as output: no



Automatically export document files during batch creation: no



7.3.2. User guidance



Through all listed menus will guided sequential. In each sub menu settings or/and decisions have to be made. There is no exit inbetween.

Layout field to save the recognized supplier

Layout field which will be filled by the trained supplier.

Possible selections

-  proceed to next menu
-  exit „configuration (modified settings will not be saved).

Directory of scans

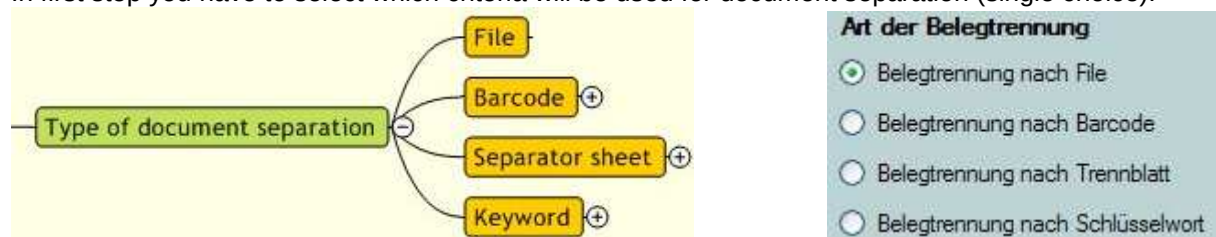
Directory path where the automatic batch creation will import the scans from. The path has to be a accesable directory (Default: „C:\Programme\One Click Solutions\AutoClick\CFG\Auto\Scans“).

Possible selections

-  proceed to next menu
-  exit „configuration (modified settings will not be saved).

Document separation

In first step you have to select which criteria will be used for document separation (single choice):



The configuration will navigate only through the selected path. At the end of the path it will continue with "Create multipage-Tif document files".

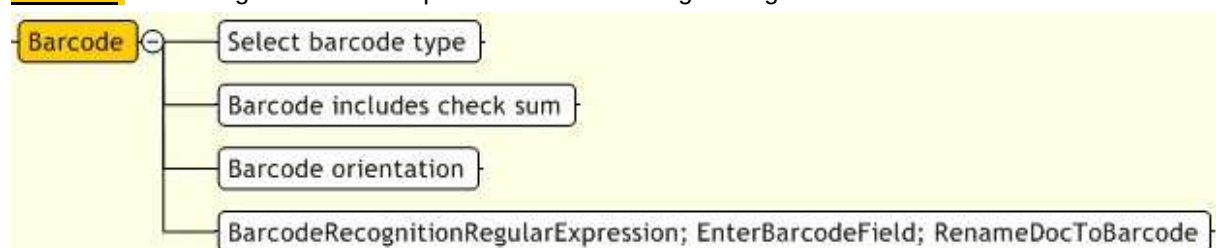
Possible selections

-  back to last setting.
-  confirmation to proceed settings (single choice). If you e.g. select „separator sheet“ the settings for „file“, „barcode“ and „keyword“ will not be shown).
-  exit „configuration (modified settings will not be saved).

The different paths are as follows:

File: each image file contains exact one document. So no further setting has do be made at this state and the configuration continues with "Create multipage-Tif document files".

Barcode: The navigation leads sequential to the following settings:



1. Barcode types: multiple selection choice. With „Autodetect“ ClickScanner will decide by itself:



Barcode types

- ☒ Autodetect
- ☐ Interleaved25
- ☐ EAN13
- ☐ Code128
- ☐ EAN8
- ☐ PDF417

Possible selections:

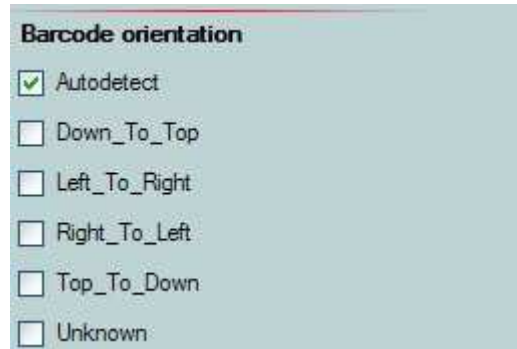
-  back to previous setting
-  proceed to next setting
-  exit „configuration (modified settings will not be saved).

2. Barcode has to contain a check sum: yes/no.

Possible selections:

-  back to previous setting
-  proceed to next setting
-  exit „configuration (modified settings will not be saved).

3. Barcode orientation; in which direction should the barcode be read:



Barcode orientation

- ☒ Autodetect
- ☐ Down_To_Top
- ☐ Left_To_Right
- ☐ Right_To_Left
- ☐ Top_To_Down
- ☐ Unknown

Possible selections:

-  back to previous setting
-  proceed to next setting
-  exit „configuration (modified settings will not be saved).

4. further settings:

- Definition of a regular expression of the barcode has to be (for regular expressions see separate chapter).
- field name in the layout where the captured barcode will be copied (only for the products ClickReader und AutoClick)
- selection whether the captured barcode will be used as file name.

BarcodeRecognitionRegularExpression

Regular expression for barcode recognition - see the chapter about regular

EnterBarcodeField

Name of database column (layout field) to store a recognized barcode

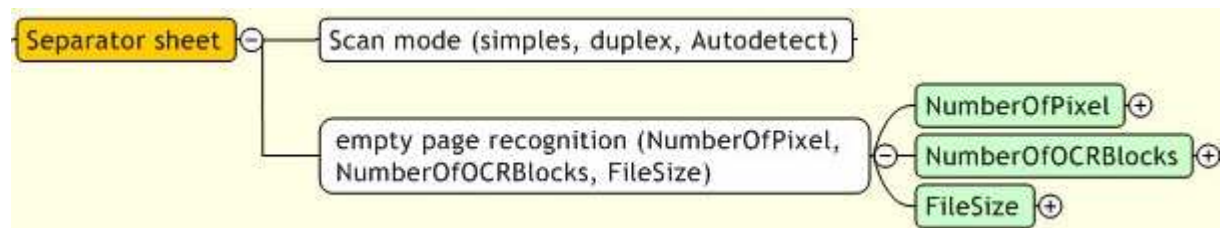
RenameDocToBarcode☐ Rename document file

Rename document file to barcode

Possible selections:

-  back to last setting
-  proceed to next setting "Create multipage-Tif document files".
-  exit „configuration (modified settings will not be saved).

Separator sheet: separation by separator sheet. The wizard will proceed sequential to the following settings:



1. Scan-Modus: single choice decision whether the programm will look for single oder double paged scans or decide by itself.

Next possible selections:

-  back to previous setting
-  proceed to next setting
-  exit „configuration (modified settings will not be saved).

2. empty page recognition: single choice for criteria of empty page recognition:

Empty page recognition☒ NumberOfPixel☐ NumberOfOCRBlocks☐ FileSize

Please choose the method used for empty page recognition.

Next possible selections:

-  back to previous setting
-  proceed to next setting
-  exit „configuration (modified settings will not be saved).

Further settings detailed:

Number of Pixel

- EmptyPageMaxBlackWhitePercentage: Max. percent (as floating point) of white (or black) pixel on an empty page
- EmptyPageThumbnailScalePercentage: size of Thumbnails for empty page recognition (for number of pixel)

Next possible selections:

-  back to previous setting
-  proceed to next setting
-  exit „configuration (modified settings will not be saved).

- EmptyPageMinWhitePixelBrightness: Min. brightness of white pixel (0 to 255)
- EmptyPageAnalyzeAreaPercent: used size for empty page recognition (for number of pixel)

Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved).

Number of OCR Blocks

- EmptyPagesMaxBlocks: Max. number of text blocks to detect an empty page

Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved).

File Size

- EmptyPageMaxFileSize: Max. file size in bytes to detect an empty page:

Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved).

Keyword: documents will be separated by the defined keyword. The keyword has to be unique and should not occur somewhere else in a document (otherwise the document will be separated there as well).

Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved).

Create Multipage-Tif

Create multipage-TIF document files

☒ Create multipage-TIF document files

Create multipage-TIF document files

Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved).

Further settings:

- MultiPageSuffixAndExtension: based on a regular expression you define how the end of the file name will be extended (e.g. continuously counting of a four sized number). Additionally you specify the filename extension (e.g. .tif). In case of the setting 'RenameDocToBarcode=True' you have to choose '.tif' (see last setting in section „Barcode“).

MultiPageTIFSuffixAndExtension

{0.d4}.tif

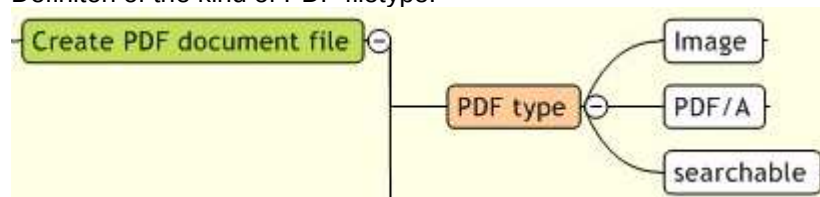
Suffix and extension for the creation of document files in multipage TIF format.

Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved).

Create PDF-document files

Defintion of the kind of PDF filetype:



First you decide whether PDF files will be created:

Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved).

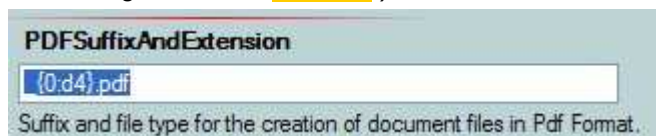
Notice: to create PDF files you need the adequate product licence key!

- **PDF type:** you can choose between PDF image (pure image file, not searchable), PDF/A (standard) und searchable (complete searchable file:

Next possible selections:

-  back to previous setting
-  proceed to next setting
-  exit „configuration (modified settings will not be saved).

- **PDFSuffixAndExtension**: based on a regular expression you define how the end of the file name will be extended (e.g. continuously counting of a four sized number). Additionally you specify the filename extension (e.g. .tif). In case of the setting 'RenameDocToBarcode=True' you have to choose '.pdf' (see last setting in section „Barcode“).

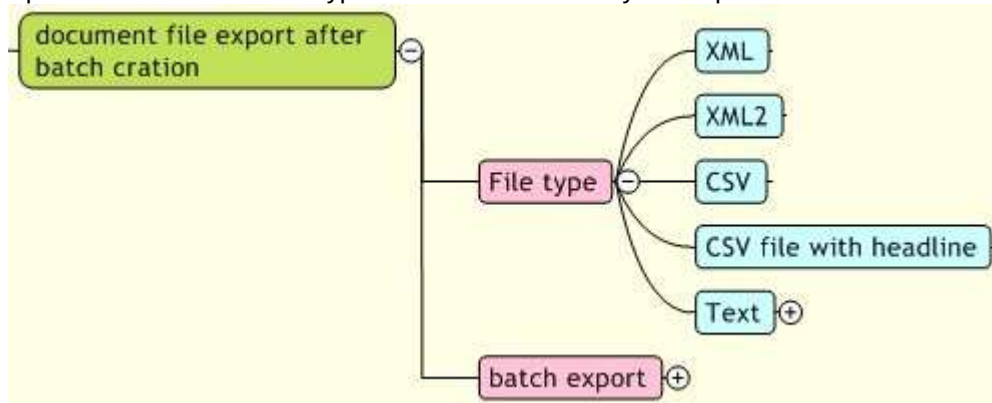


Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved).

Export of document files

Specification as which file type and in which directory the captured index data will be exported:



In the first setting you have to choose whether document files will be exported.

Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved).

- **File type**: multiple choice selection. With the selection „text“ there is a sub menu:

Sub menu with selection „Text“:




Next possible selections:

-  back to previous setting
-  proceed to next setting
-  exit „configuration (modified settings will not be saved).

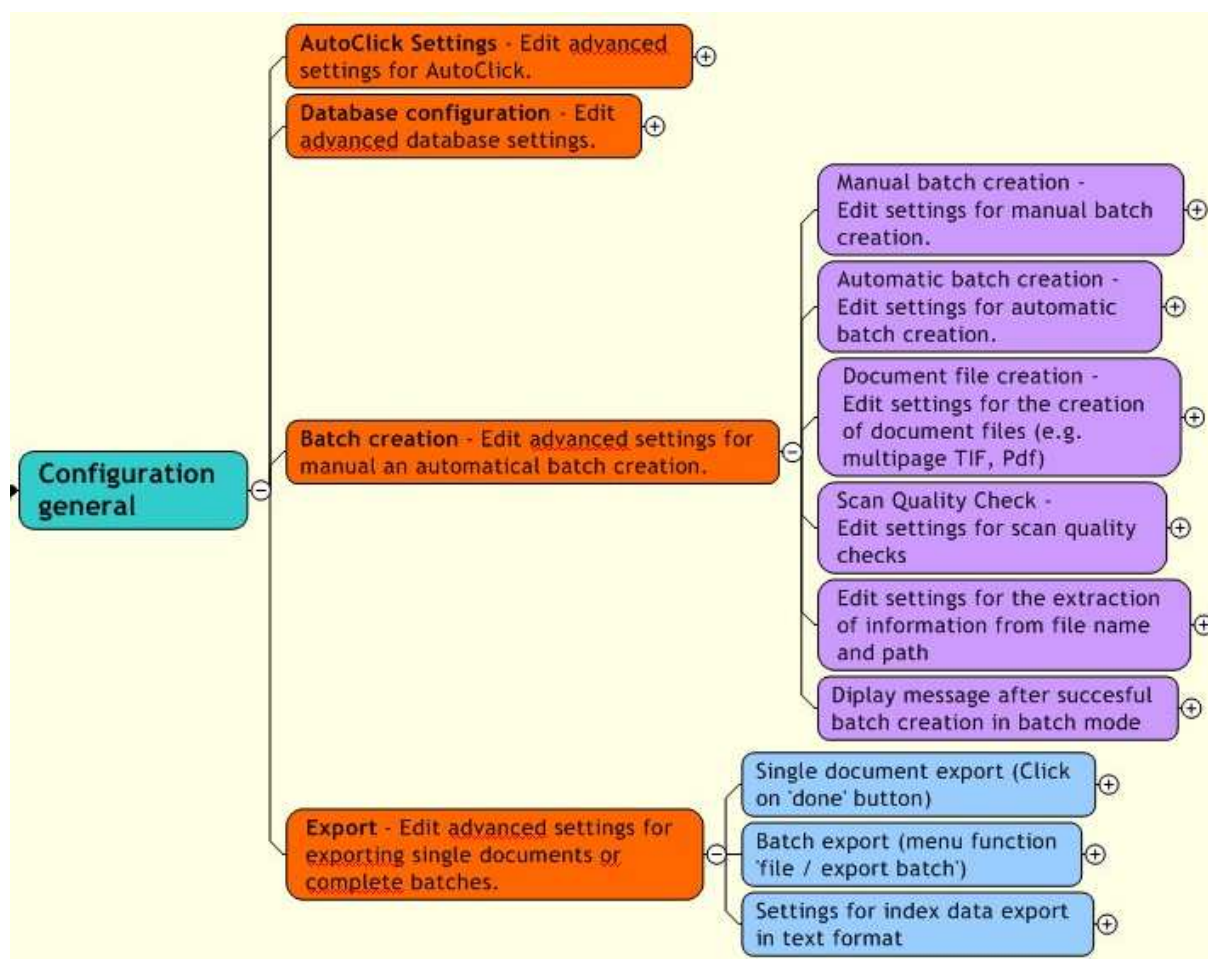
- **Batch export**: definition in which directory the export files will be copied. In addition you can define a command for a program start another program and whether fulltext files will be created.

- ExportBatchIndexDirectory: Export directory for index data files
- ExportBatchImageDirectory: Export directory for export document files. Possible wildcards: #Dn#, #Dt#, #Ly#, #Jjjj#, #Jj#, #Mm#, #Tt#, #Kw# and ##fieldname##
- ExportBatchPostProcessingCommand; Command which will be executed after the export.
- ExportBatchFulltextFiletype: file type for additional fulltext file export.

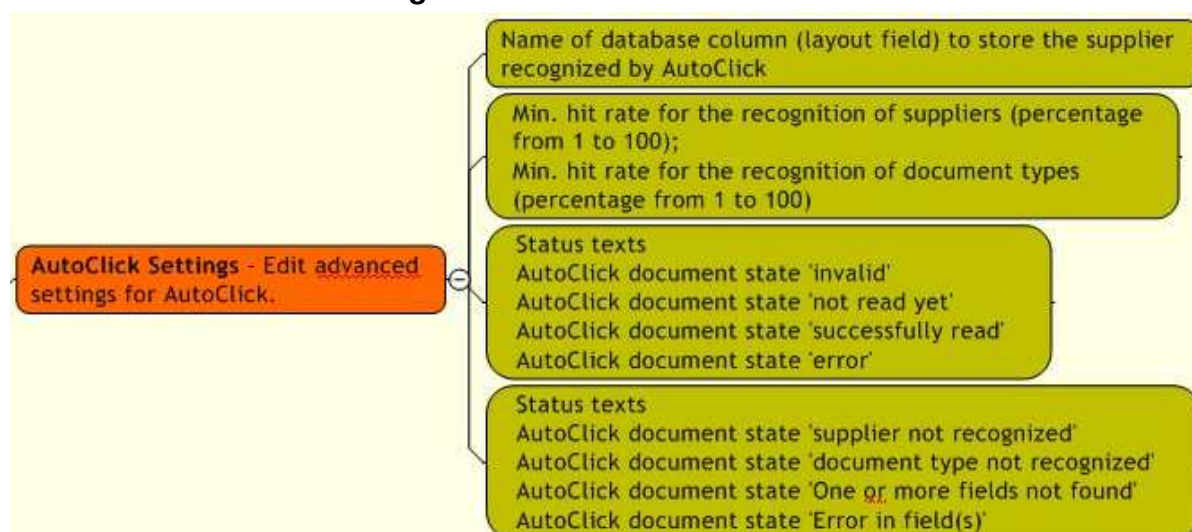
Next possible selections:

-  back to previous setting
-  confirmation to go to the next setting
-  exit „configuration (modified settings will not be saved)

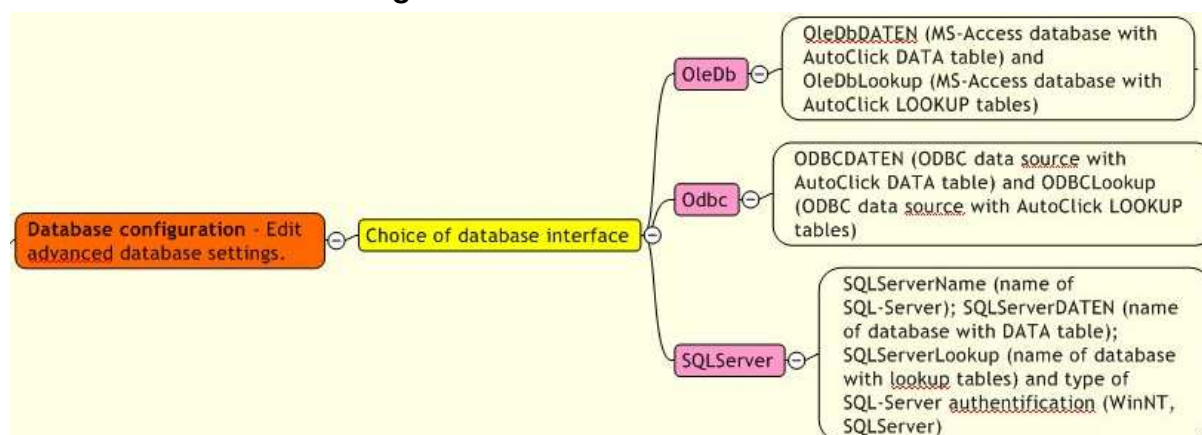
7.4. Complete configuration



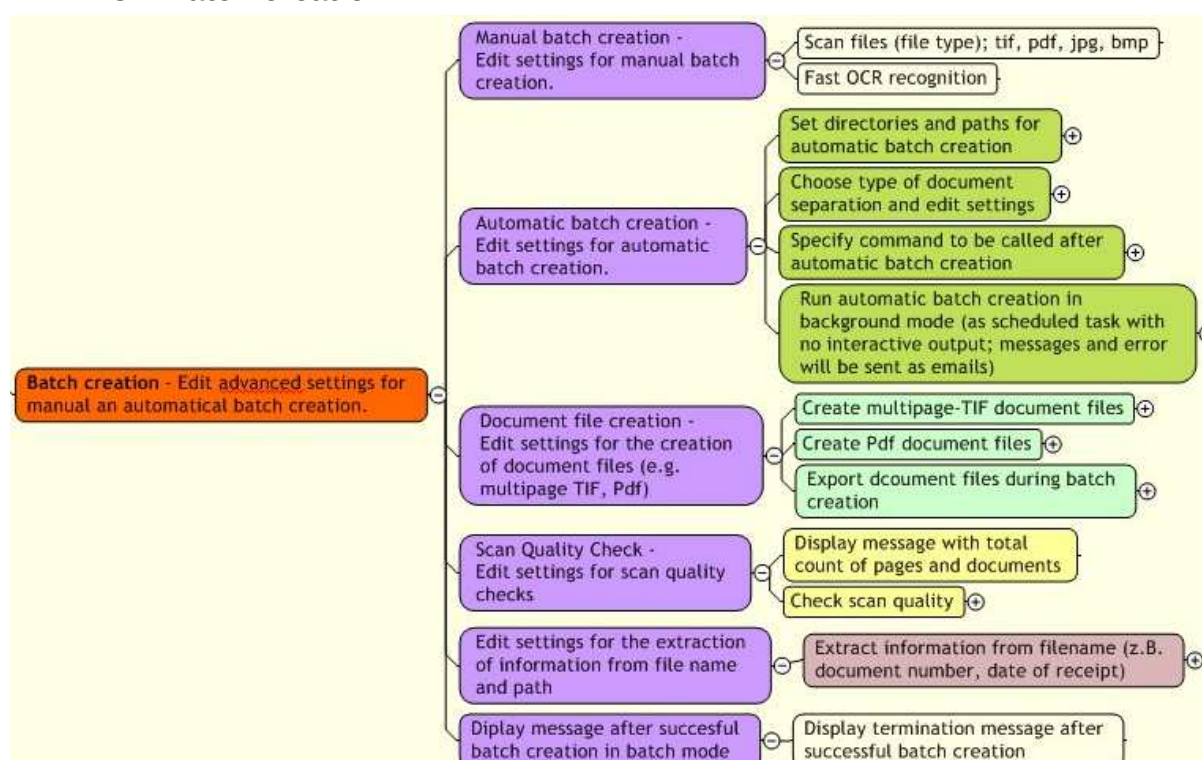
7.4.1. AutoClick settings



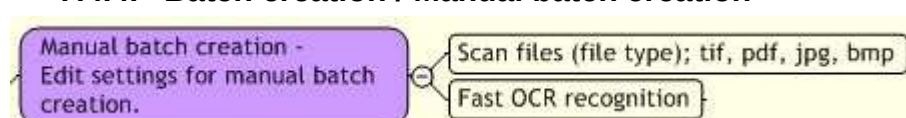
7.4.2. Database configuration



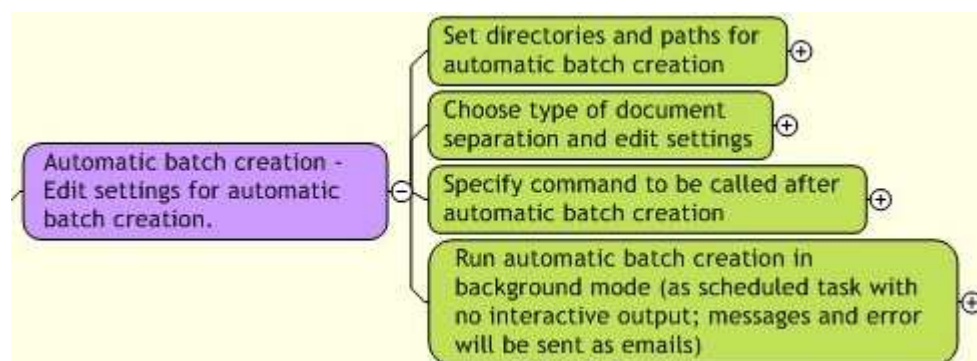
7.4.3. Batch creation



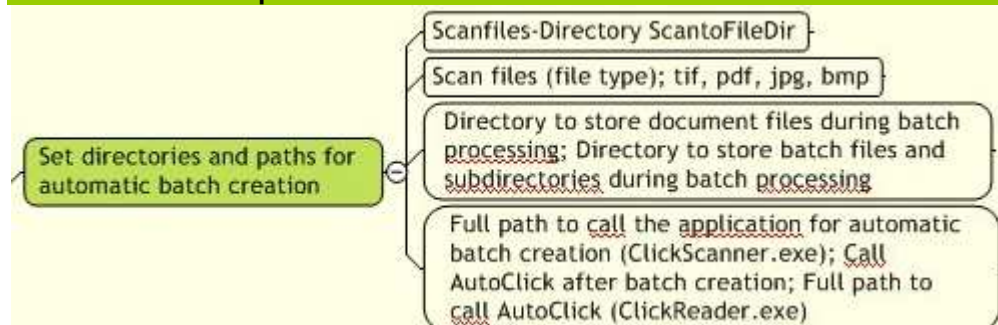
7.4.4. Batch creation / Manual batch creation



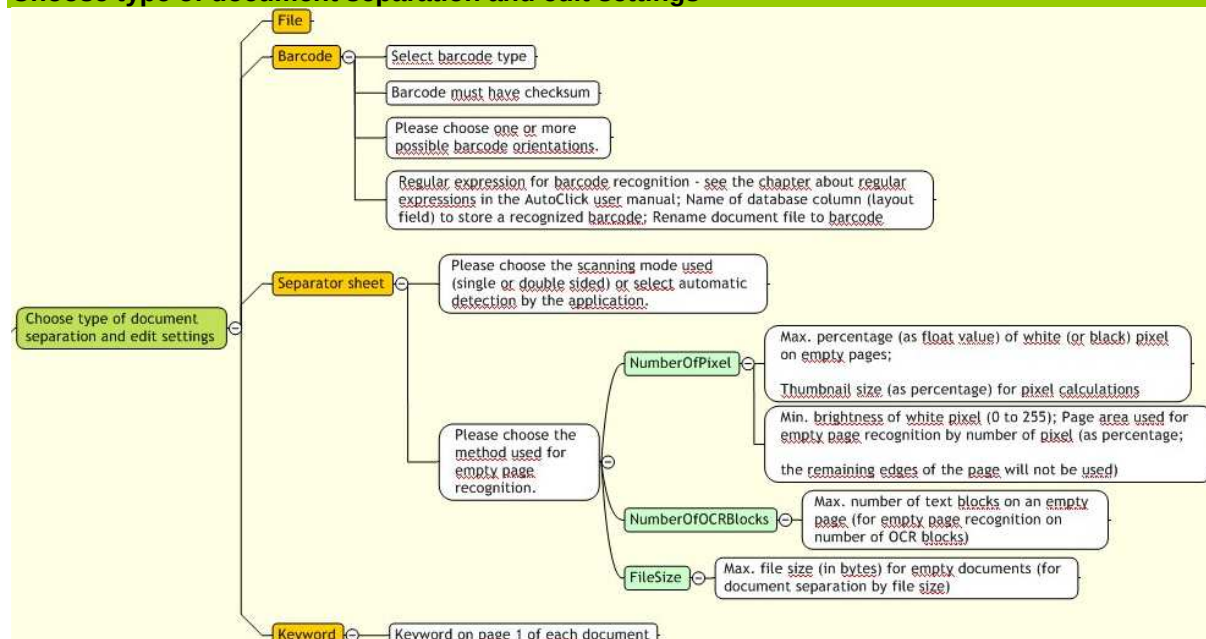
7.4.5. Batch creation / Automatic batch creation



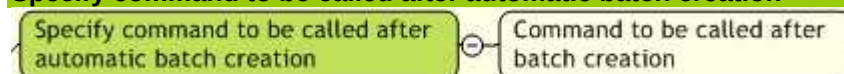
Set directories and paths for automatic batch creation



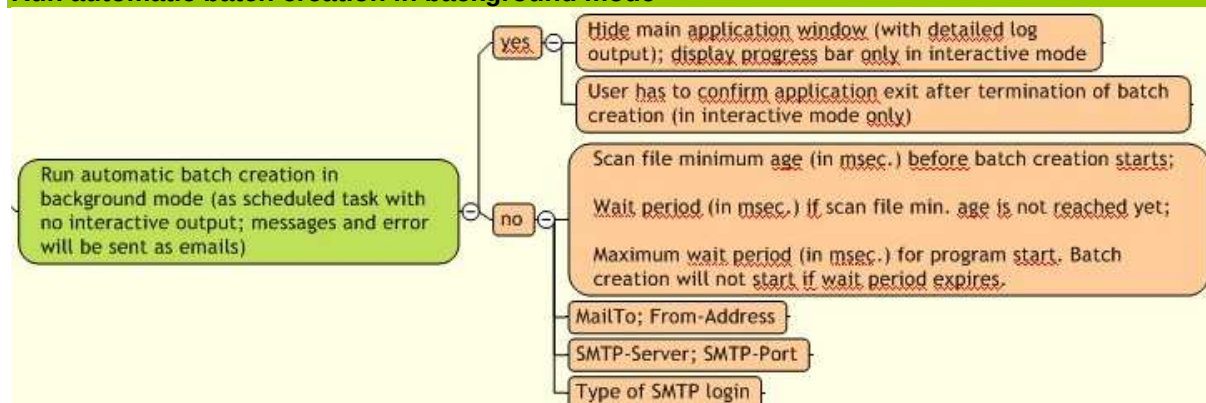
Choose type of document separation and edit settings



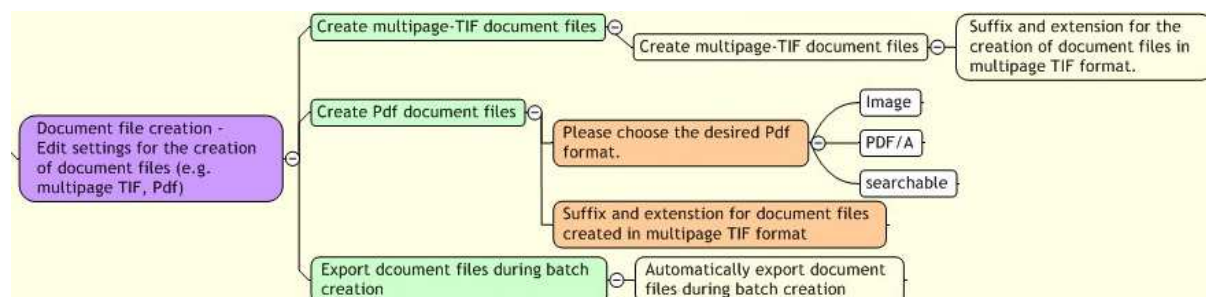
Specify command to be called after automatic batch creation



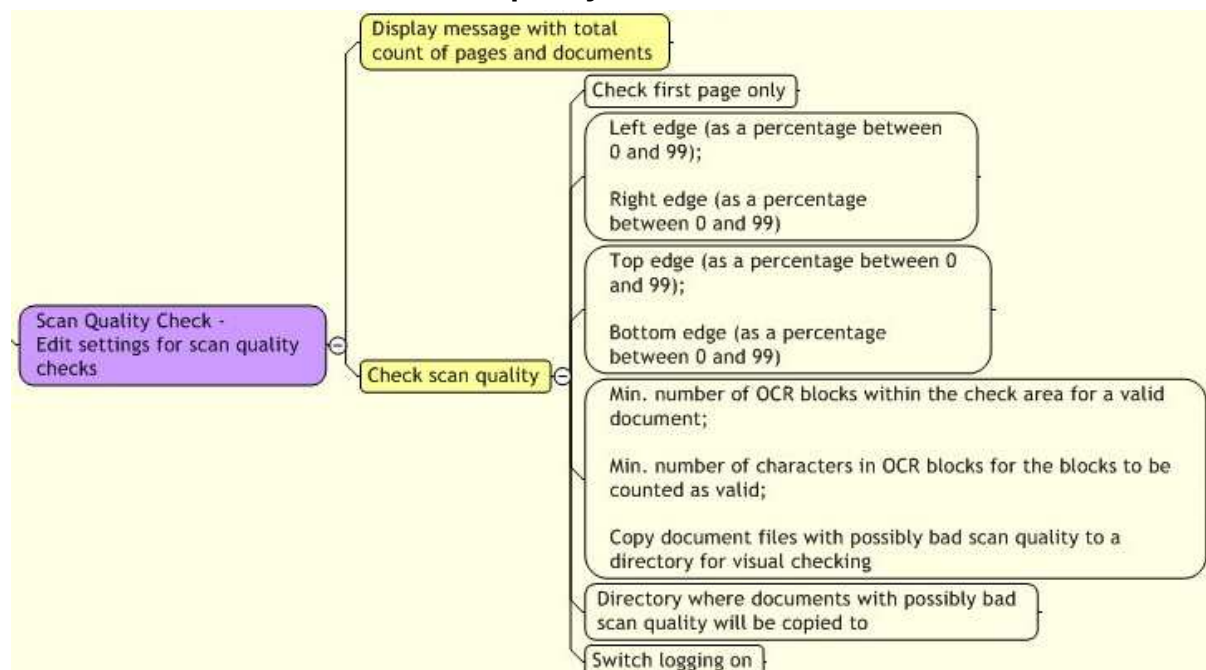
Run automatic batch creation in background mode



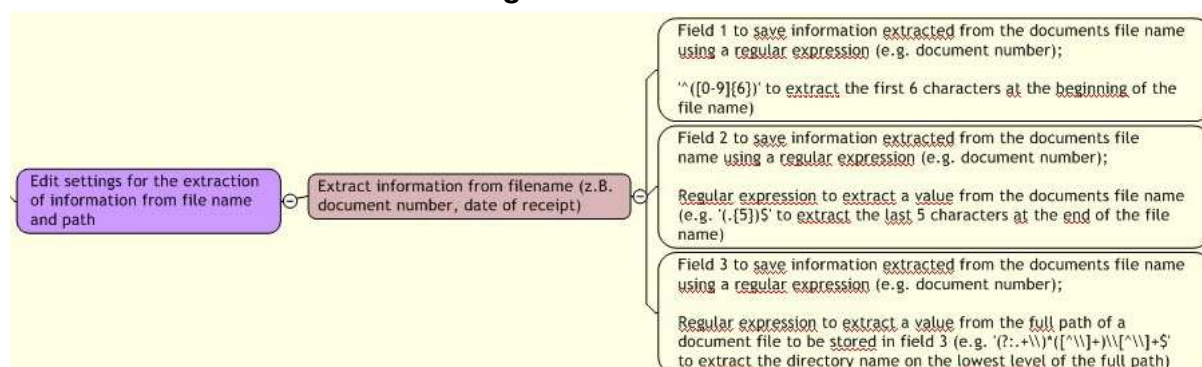
7.4.6. Batch creation / Document file creation



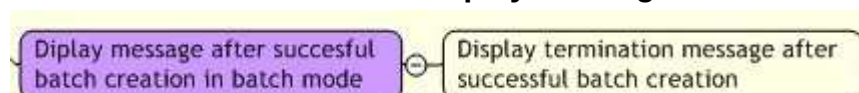
7.4.7. Batch creation / Scan quality check



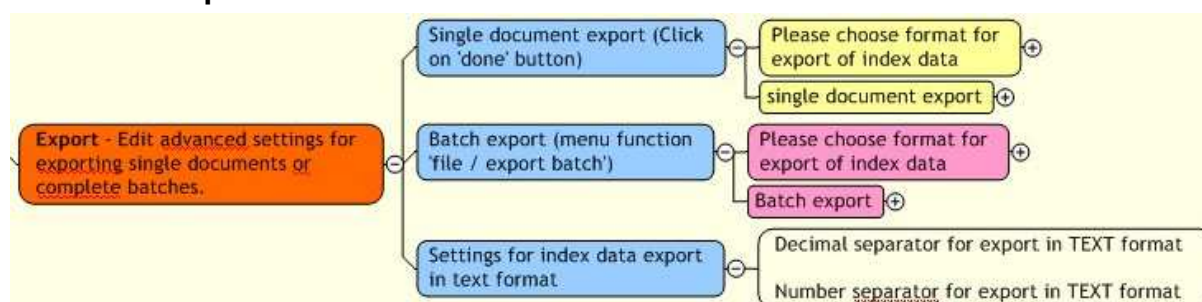
7.4.8. Batch creation / Settings for extraction



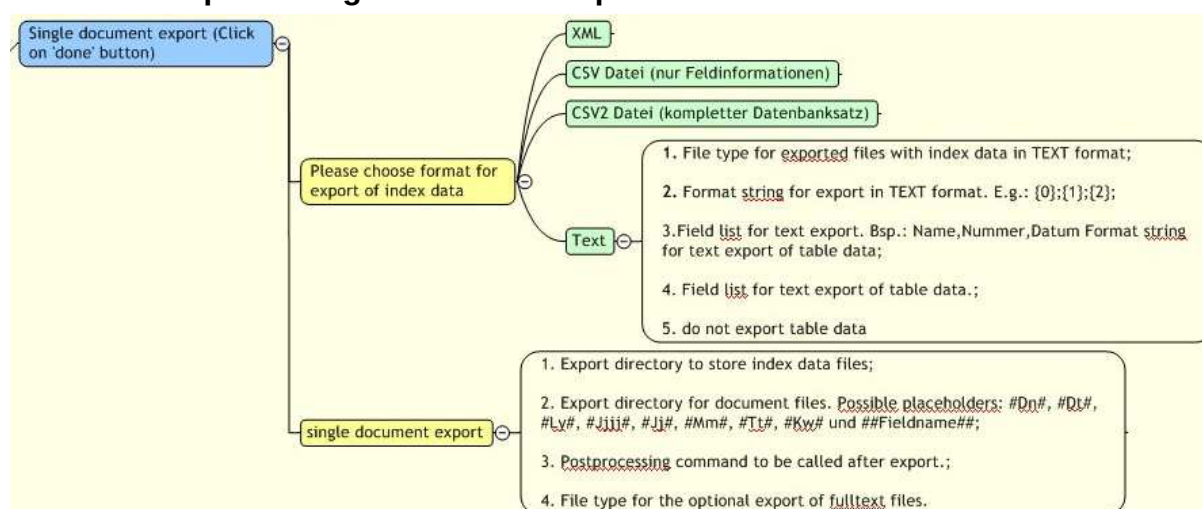
7.4.9. Batch creation / Display message



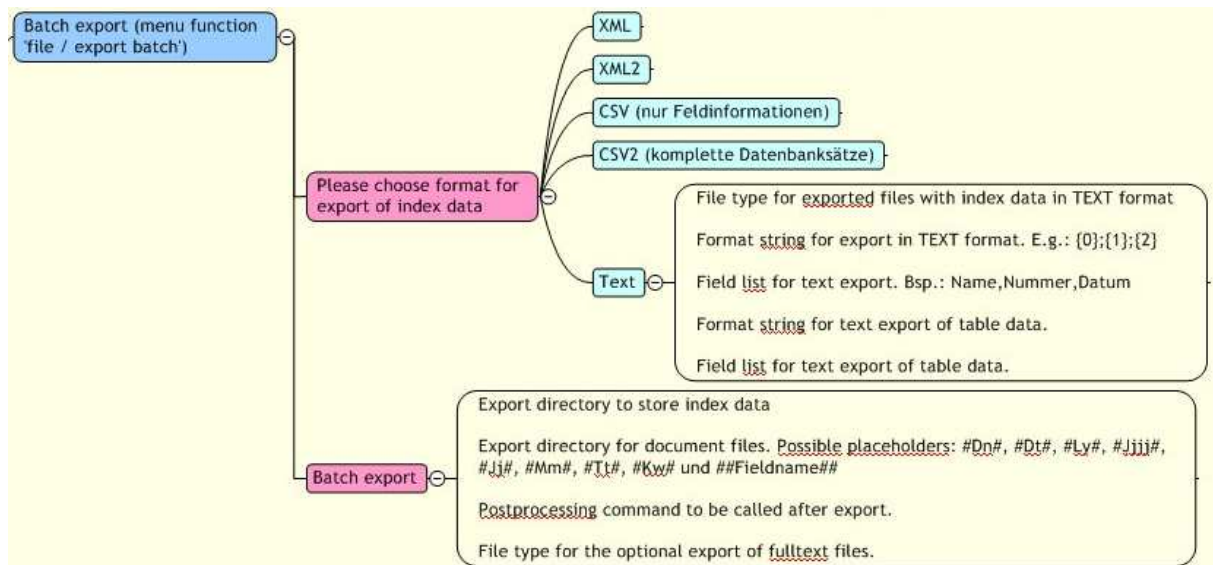
7.4.10. Export



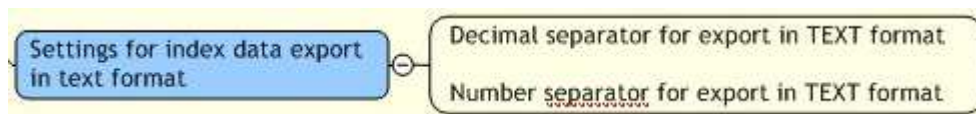
7.4.11. Export / Single document export



7.4.12. Export / Batch export



7.4.13. Export / Settings index data export



8. Imprint

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